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a BDSA *export potential study*

THE MARKET FOR **MEN'S and BOYS' CLOTHING** in WESTERN EUROPE

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a BDSA *export potential study*

THE MARKET FOR **MEN'S AND BOYS' CLOTHING** IN WESTERN EUROPE

NOVEMBER 1964

UNITED STATES DEPARTMENT OF COMMERCE

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Foreword

Expansion of the economies of European countries has been accompanied by increased mass production, a trend toward readymade clothing for men and boys, and a decline in traditional custom-tailored clothing. This presents an opportunity to U.S. manufacturers of readymade clothing to profit from their long experience by selling in these changing, growing markets.

This survey is intended to help U.S. businessmen visualize the rising sales potential in Western European markets and to guide newcomers to this new field of export sales of men's and boys' outerwear.

Data for the survey were gathered from trade sources by U.S. Foreign Service Officers in 12 European countries. Other information available in the U.S. Department of Commerce, Bureau of International Commerce, was added. The Clothing Manufacturers' Association of the United States of America cooperated on the project.

The survey was prepared under the direction of William W. Shoaf, Director, Business Services and Analysis Division, Office of Textiles. Material was assembled and compiled by Barbara A. Smith.

James S. Love, Jr.
Deputy to the Secretary for Textile Programs

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Introduction

This study provides guidelines for marketing men's and boys' outer clothing in countries that are full members of the European Economic Community (EEC) or, except Portugal, of the European Free Trade Association (EFTA).[1] Portugal requires licenses for imports of clothing and offers little or no opportunity as an export market.

EXPLANATION OF TERMS

EEC and EFTA are gradually revising their tariffs. The EEC countries plan by 1970 to eliminate internal tariffs and to set a common external tariff (CXT) on goods imported from all nonmember countries. In the process of setting the CXT, some EEC countries may be required to lower their present tariffs and others to raise them.

The tariffs given in this report are those in effect as of December 1963, and therefore may not be up to date. Current tariff data may be obtained from Department of Commerce Field Offices.

In the countries covered in this survey, the ad valorem duty is charged as a percent of c.i.f. value (cost, insurance, freight). Tariffs are paid by the importer, but they will be of interest to the exporter because they add to the cost of the product to the ultimate consumer.

The terms "outer clothing" and "readymade outer clothing" are used interchangeably in this study. "Men's and boys' readymade outer clothing" is defined here as men's and boys' readymade suits, overcoats, topcoats, sportcoats, and slacks of wool or part wool, not waterproof, and not knit. Tariffs on garments made of these materials differ from tariffs on garments made of other materials.

[1] Members of the EEC are Belgium, France, Italy, Luxembourg, the Netherlands, and the Federal Republic of Germany. Members of EFTA other than Portugal are Austria, Denmark, Norway, Sweden, Switzerland, and the United Kingdom.

Lists of foreign firms interested in importing men's and boys' outer clothing may be obtained from the Commercial Intelligence Division, Bureau of International Commerce, U.S. Department of Commerce, Washington, D. C. 20230, or from any Department of Commerce Field Office, at a cost of $1 for each country list.

Unless otherwise indicated sources of the tabular data included in this study are Foreign Service despatches.

Summary

There is a growing trend in Western Europe toward the acceptance of readymade clothing. Previously almost all men's clothing was made to order; now the proportion is from 50 to 90 percent of the total sales of men's outer clothing. Overcoats and topcoats make up most of the readymade clothing.

The increasing prosperity enjoyed by the European Economic Community (EEC) and the European Free Trade Association (EFTA) countries has brought about a rise in the consumption of clothing in these countries. Some of this rise in consumption is filled by increases in domestic production, but much of the rise is met by increased imports. Thus, there is a growing market in the EEC and EFTA countries for imports of readymade men's and boys' outer clothing.

At the present time, most of these imports are supplied by members of the EEC and EFTA. One reason for this is that members of the EFTA and EEC enjoy a tariff advantage within their trading groups.

The European Economic Community consists of Belgium, France, the Federal Republic of Germany, Italy, Luxembourg, and the Netherlands. Tariffs of and affecting these countries are changing, but by 1970 duties are expected to stabilize at a 20-percent ad valorem common external tariff applying to all non-EEC countries. Also by 1970, EEC members will by stages have eliminated tariffs within the Community.

The European Free Trade Association, consisting of Austria, Denmark, Norway, Portugal, Sweden, Switzerland, and the United Kingdom, is keeping pace with the European Economic Community by reducing tariffs between ETA countries, but no concerted effort is being made to change tariffs applying to nonmembers.

Nevertheless, it is believed that there is a definite market for U.S.-made men's and boys' clothing, particularly casual wear and clothes made with the new blended fabrics. Heavyweight fabrics have been preferred in the past, but medium and lighter weight fabrics are gradually gaining acceptance and will offer new opportunities for imports.

Selling readymade clothing in Western Europe is not too different from selling in the United States. Many of the sales techniques and promotions

used in the United States will be effective in Western Europe. In most of the countries, advertising agencies are available to help the businessman handle the advertising. Advertising literature and labels should be in the language of the country in which goods will be sold.

The U.S. manufacturer must expect to put as much effort into selling and service in Western Europe as he does in the United States. Retailers in Western Europe report that they would be interested in buying men's clothing from the United States, but that no strong selling effort has been made to them.

Trade fairs are widely used in Western Europe for displaying merchandise to be sold. Much of the season's buying is done at these fairs; and to gain success, the importer must be ready to take part in them and to show samples with prices. Prices should be quoted c.i.f. port of entry. When the clothing is equal in quality to that produced locally, the prestige of the "Made in U.S.A." label will often overcome the slight difference in price.

Part I. European Economic Community

BELGIUM-LUXEMBOURG ECONOMIC UNION

Production

Figures released by the National Institute of Statistics show that Belgian production of readymade outer clothing for men and boys has been increasing steadily . . . from $30.8 million in 1959, to $34 million in 1960, $36.7 million in 1961, $37.9 million in 1962, and an estimated $25 million in the first 7 months of 1963, 14 percent more than in the corresponding period in 1962.[1] Main producing areas in Belgium are Binche (in the province of Hainaut), which has about one-third of the country's total production capacity and contains the most mechanized enterprises; Brussels (also accounting for one-third of production capacity), which has mostly integrated enterprises that sell an important part of their production direct to the consumer in large retail outlets; and an area including Antwerp, Liège, Ghent, Bruges, Charleroi, and Tournai. Companies located in this area are similar to those in the Brussels area and vary in importance with the size of the market in which they are located.

It is reported that no civilian readymade clothing is produced in Luxembourg.

Imports

Imports of selected items of men's and boys' readymade outer clothing are shown in table 1.

[1] These figures are for all Belgian firms employing at least 10 persons. No detailed statistics on Belgian production of men's readymade outer clothing are available.

The Netherlands is the principal foreign supplier of men's outer clothing, accounting for 66 percent of total Belgian imports of such goods in 1962, and for 67 percent during the first 9 months in 1963. West Germany ranked second, supplying 15 percent of Belgian imports in 1962, and 16 percent in the first 9 months of 1963.

Channels of Distribution

Domestic retail sources estimate that not more than 60-75 percent of men's and boys' outer clothing sold in Belgium is readymade. About 15 percent of this clothing is bought in small stores (one or two employees); 50 percent in medium-size stores (three to six employees); and 35 percent in large stores (six or more employees) including chain stores, selling 16 percent of total sales, and department stores, selling 19 percent. Almost no men's and boys' outer clothing is sold by mail order houses.

There appear to be a few wholesalers specializing in outer clothing in Belgium, but most retailers buy direct from the manufacturer, placing orders 4-6 months in advance of the selling season. Some retailers place all of their orders in advance, but most place about 50 percent in advance and follow up with one or more orders according to demand. Retailers store their own merchandise.

The prestige of wearing made-to-order clothing is still a factor among older men in Luxembourg, but is gradually losing importance. Of all men's and boys' outer clothing now sold in Luxembourg, 65 percent are readymade garments and 35 percent made to order.

Luxembourg retailers place approximately 70 percent of their orders 6 months in advance of the selling season. The retailer stores his own stock of merchandise.

Medium-size stores (4-12 employees) account for about 60 percent of total sales of men's and boys' readymade outer clothing in Luxembourg. Small stores (3 employees and less) and large stores or chain stores (more than 12 employees) each sell 20 percent. There are no prestige men's clothing stores in Luxembourg.

Importers generally deal with a foreign manufacturer or his agent. Manufacturers' agents and distributors usually act as representatives for the combined Belgium-Luxembourg sales territory; their headquarters are in Antwerp, the main clearing post for nearly all U.S. goods destined for Luxembourg or Belgium.

Orders usually are placed through factory agents and delivered direct to the retailer within 2-3 months. There are few importer-distributors. Payment is usually made 30-90 days after delivery. Invoices are generally discounted 3 percent for payment in 45 days and 2 percent for payment in 60-90 days.

Styles, Sizes, Prices

Styles and sizes are similar to those of German-produced outerwear. Tables 2 and 3 give some indication of general price levels of men's and boys' clothing in Belgium and Luxembourg.

Market Potential

Wages and personal income have risen in Belgium with the increase in economic activity. Per capita income is among the highest in Europe. Consumption, consequently, is also high. Expenditures for clothing alone in 1961 were 13.7 percent of total consumer expenditures.

Production of men's and boys' outer clothing must be supplemented by imports to meet domestic demand. In 1962 Belgium-Luxembourg together spent $2.7 million on imports of suits for men and boys, about $2.2 million more than the amount exported. Imports of overcoats ($1.6 million) exceeded exports by $848,500, and imports of sportcoats were $194,180 higher than total exports of this item. Imports of jackets were $1.1 million. However, only $738,551 was spent for imports of men's and boys' slacks, compared with exports of $3 million.

Import duties in general are more favorable for EEC members than for the United States, and imports from the Netherlands are duty-free; but it is believed that original and attractive U.S. products, principally sportswear, will find an outlet in Belgium.

The Belgian market for the new wash and wear clothing, and for men's medium-weight suits and coats, especially the "wrinkle-free" suits, is expanding. The Belgian customer is quality conscious, but U.S.-made merchandise equal in quality and competitive in price with domestic merchandise sometimes has a greater appeal than the Belgian product because of the prestige of the U.S. label.

The Luxembourg market for men's and boys' clothing is small by U.S. standards. The country's population in 1960 was 322,000; 116,000 were men between the ages of 15 and 64, and 20,200 were boys 5-14 years of age.

The market for boys' clothing, especially slacks, is limited. The market for lightweight men's summer suits also is small but it is growing, as Luxembourgers are becoming prosperous enough to dress appropriately for the several warm summer weeks when the temperature rises as high as 85° Fahrenheit. A moderate amount of U.S. readymade clothing (especially for boys and young men) could be sold if the garments were competitively priced and styled to suit European tastes.

Tariffs and Licenses

The ad valorem duty for imported U.S. men's and boys' wool or part wool outer clothing is 20 percent. Men's and boys' outer clothing imported from EEC countries carries an ad valorem duty of 9.6 percent.

In addition to the ad valorem charge, Belgium has a transmission tax of 16 percent that applies to all countries. No import license is required.

Luxembourg has a 2-percent import tax and a 2-percent turnover tax besides the ad valorem charge. No import license is required.

FRANCE

Production and Imports

French production of selected items of readymade men's and boys' outer clothing in 1960 is shown in table 4.

Table 5 shows imports by country of origin of selected items of men's and boys' readymade outer clothing in 1961 and 1962. In 1962 West Germany contributed 40 percent of French imports. Italy was second with 36 percent.

Channels of Distribution

About 70 percent of the suits sold in France, 90 percent of the overcoats, 90 percent of the sports jackets, 95 percent of the slacks, and 97 percent of the sportswear are readymade. Readymade includes "mesure industrielle"—i.e., the customer chooses the materials, his measurements are taken, and the manufacturing is done at the factory as a 100-percent readymade.

Retailers buy direct from manufacturers. Large retailers (sales volume above $300,000; average sales, $450,000) generally place 90 percent of their orders 6 months in advance of the selling season; small- (sales volume below $100,000) and medium-size stores (sales volume of $100,000-$300,000) place 50-60 percent of their orders 6 months in advance of the selling season. The two seasons are September 15-November 15 and March 15-May 15.

Retail outlets are also mantained by the large manufacturers, who generally store stocks at the manufacturing site until they are required. The independent medium- and small-size retail outlets draw stocks from manufacturers as needed.

Small- and medium-size stores together account for 70 percent of retail sales of men's and boys' readymade outer clothing. Large stores sell approximately 30 percent (chain stores, 22.5 percent and department stores, 7.5 percent).

Although an attempt 2 years ago to establish a chain of men's apparel retail outlets in Paris suburbs was not as successful as anticipated, chain outlets are expected to be established as suburbs expand, bringing about a change in buying habits.

A new development in France is the sale of inexpensive men's wear, especially sportswear and shirts, at supermarkets such as Inno-France, which now has six branches in the country.

Boys' and girls' wear in age bracket 12-18 is also being retailed in a new type of outlet known as PRE BAC (Pre-Graduation). The store has several separate departments which carry complete outfits—i.e., suits, raincoats, overcoats, sportswear, skisuits, caps, shoes, underwear, shirts, and belts—for boys and girls of various age brackets (12-14, 14-16, 16-18). Items are carefully selected for details that will have a strong appeal for young customers.

Retailers who import men's and boys' outer clothing place their orders with visiting sales agents. There are no wholesalers. Retailers expect delivery in 6 months and credit terms of 30, 60, or 90 days.

Prices

Sample prices of selected types of men's and boys' outerwear are shown in table 6. These samples were obtained from well-known stores in three classes of outlets.

The Men's Apparel Manufacturers' Association reports a slight increase in sales of higher priced winter and summer suits. The proportion of total sales of winter suits accounted for by suits in various price ranges in the winter season of 1963-64 is shown below:

Price range	Percent of total sales	Price range	Percent of total sales
Under $36	2	$55 to $60	23
$36 to $42	4	$61 to $66	19
$43 to $48	8	$67 to $74	17
$49 to $54	16	Over $74	11

The proportion of total sales of summer suits accounted for by suits in various price ranges is shown below:

Price range	Percent of total sales	Price range	Percent of total sales
Under $30	4	$51 to $60	31
$38 to $40	9	Over $60	16
$41 to $50	40		

The retailer's markup on the manufacturer's price is normally 33⅓ percent.

Styles

U.S. clothing styles are not markedly different from French styles except in scale of sizes and in weight of wool fabrics. French customers usually prefer heavier materials, as they tend to associate weight with quality. However, a change in consumer preference, especially in large cities, is becoming apparent. Lighter weight fabrics are being used more than previously for suits and topcoats, and an increasing number of Frenchmen are buying suits exclusively for summer wear. Young men and boys are becoming very fashion conscious. Retailers report a noticeable increase of interest in clothing by young men over 16 years old.

French customers are becoming brand conscious. A trend that is just beginning and is expected to grow is the development of brand reputations by some large manufacturers.

The Centre d'Etudes Techniques des Industries de l'Habillement, a research bureau sponsored by the Manufacturers' Association, is gathering information for the purpose of standardizing measurements in France. Eventually, with the cooperation of similar manufacturers' associations in other countries, they hope to standardize throughout Europe.

According to the Productivity Committee of the Manufacturers' Association (CAPCOMA), styles are changing very slowly. In men's suits, colors and types of fabrics are the features changing most noticeably. In 1963, 97 percent of men's suit sales were single breasted, but dealers anticipated an increased demand for double-breasted suits during the coming season. Two-button coats are preferred. Suits without side or back vents represent 73 percent of total sales.

Colors remain classic. Average or dark grey represent 40 percent of total sales; blue, 18 percent; and brown, 25 percent. Woolen fabrics are used in 49 percent of the suits made, but in 1964 about 52 percent of the suits will probably be of wool. Twenty percent of suits sold in 1963 were made of blendings of wool and Dacron, but in 1964, 24 percent of the suits sold are expected to be of these blends. Sales of light summer suits, which for many years were insignificant, represented 28 percent of total sales in 1963. Eighty-one percent of summer suits were made with blends the greater part of which were of man-made fibers.

Consumers' preferences with regard to topcoats have not changed significantly. Topcoats continue to be straight in style and dark in color.

Market Potential

Imports of men's clothing are expected to continue increasing because of the strong appeal of foreign styles. Italian raincoats and British sportswear, for example, although slightly more expensive than comparable French apparel, enjoy a good demand because of their novelty and differ-

ence in style. U.S.-manufactured men's wear should find a reasonably good market, even at slightly high prices, provided there is a novelty appeal. U.S. styles for beachwear, sportswear, leisurewear, etc., should prove attractive to Frenchmen, who are not offered a wide range of choice in similar domestically manufactured products. This opinion was also expressed by an official of the Federation des Fabricants Francais du Vetement Masculin on his return from a business trip in the United States in early 1964.

In view of the increasing interest in U.S.-made clothing, U.S. manufacturers and exporters will find it worthwhile to exhibit at the specialized salon, "*Salon Europeen de l'Habillement Masculin*," held annually in Paris in February. This show is an excellent medium for bringing products to the attention of French buyers since most of them attend the show and place orders there.

Tariffs and Licenses

Duty on men's and boys' outer clothing imported from non-EEC countries is set at 20 percent ad valorem, the CXT target. The ad valorem duty for EEC members is 7.5 percent for items of wool or cotton. Other taxes applicable to all countries are a sales tax of 26 percent of c.i.f. duty-paid value and a customs stamp tax of 2 percent of total customs charges. No import license is required.

FEDERAL REPUBLIC OF GERMANY

Production and Imports

Production of selected items of men's and boys' readymade outer clothing and imports of such outerwear made of wool or fine animal hair in 1962 and 1963 are shown in tables 7 and 8.

Channels of Distribution

German consumers are showing a decided preference for readymade clothing. Retail sources estimate that only 10-25 percent of men's and boys' outer clothing is made to order. The percent is 10 to 15 in large cities and more in small towns and rural areas.

Large establishments, including department stores, chain stores, and mail order houses, sell approximately 70 percent of all men's and boys' outerwear. Medium size stores sell 20 percent and small stores, 10 percent. Chain stores and very large retail stores, some of which reportedly sell as large a volume as individual chain stores, account for an estimated 35 per-

cent of total retail sales. Department stores sell 30 percent and mail order houses, 5 percent.

Large stores buy almost exclusively from the manufacturer. Medium-size stores buy mostly from manufacturers but also through cooperative buying organizations or from wholesalers. Small retailers buy about 50 percent from manufacturers and 50 percent through cooperative buying organizations or from wholesalers.

The large retailers (annual sales volume more than $250,000) tend to import direct from foreign manufacturers. Several department store concerns have buying agents in the United States. The chain stores and the largest individual retailers also are thought to have buying agents or other connections abroad.

Medium-size stores (annual sales volume $62,500—$250,000) buy mainly from visiting salesmen or German agents of foreign manufacturers. Some buy through cooperative purchasing organizations (*Einkaufsvereinigungen*), several of which have connections in the United States.

Small stores (annual sales volume up to $62,500) buy imported goods through cooperative purchasing organizations, wholesalers, or importers.

Many orders are placed at trade fairs, particularly the International Men's Fashion Week in Cologne. Clothing manufacturers from many countries show their products at these fairs, and failure to exhibit can severely handicap a firm's sales efforts. The trade fairs also enable foreign manufacturers to study the particular requirements of the German market.

The trade usually buys a large part of its requirements about 6-7 months ahead of the selling season and requests delivery by installments. Spring and summer samples should be shown to the retailers in October and November. In Germany, terms of sale provide that if delivery has not been made 18 days after the agreed delivery date, the buyer has the right to cancel the contract unless the delay is due to an act of God (*force majeure*).

Credit terms usually offered allow a 3.5-percent discount for payment in 10 days; a 2-percent discount for payment in 30 days; and net for payment in 60 days. Very large firms may expect more favorable terms.

Prices, Sizes

Table 9 gives sample prices in retail outlets of Bremen of various types of men's and boys' garments.

A study of retail prices of selected items of men's and boys' outer clothing was also made in November 1962. A comparison of the prices in table 9 with prices obtained in a previous study (November 1962) of selected men's and boys' outer clothing shows that most prices in the high-price level have increased while the prices in the medium- and low-price levels are generally lower. Trade sources explained that the changes were due not to an actual decline in clothing prices for identical items but to

shifts in the types and qualities of products available. In the high-price category, goods were of even better quality than in November 1962. In the medium- and low-price categories, manufacturers were reducing prices in order to improve their competitive position. Imports in the latter two categories, mainly from other EEC countries, also have exerted a downward pressure on prices.

Table 10 is the only size chart for men's and boys' clothing that is recognized as binding by the Federal Association of the German Textile Retail Trade, Registered Association. The chart lists 78 sizes—50 designated for men, 7 for cadets, and 21 for boys. The sizes were determined by measurements taken in a mass survey of about 10,000 individuals.

The key to the size designations for cadet and men's sizes is the chest measurement. Most size designations in these two categories are 2-digit figures obtained by dividing the chest measurement by 1, 2, or 4; for example, the chest measurement for men's long-slim size 94 is 94 cm., for men's regular size 48 is 96 cm., and for men's short-stocky size 24 is 96 cm. On the other hand, boys' sizes are based on height, as is the practice in other European countries. Men's stout sizes are the regular sizes preceded by the numeral 1. The boys' stocky sizes and men's short-short stocky and short-portly sizes are indicated by adding the numeral 5 to the regular measurement.

Table 10 also shows what percentage of the total men's outer clothing market is accounted for by each of the men's sizes. About 90 percent of the men measured in the mass survey were classified under 30 of the 50 men's sizes. Following is a breakdown of the 30 men's sizes by category, and the percentage share of total sales for each category:

Category	Sizes	Number of sizes	Percent of total sales
Regular	44-54	6	31.1
Stout	144-154	6	13.0
Short, stocky	23-27	5	11.0
Short-short, stocky	245-265	3	4.7
Long-slim	88-106	6	18.9
Portly	51-57	4	9.0

Source: Association of Men's and Boy's Outer Clothing Industry, Registered Association, Germany.

Market Potential

The large department stores seem to represent the best medium for volume sales of U.S. outerwear in West Germany. These stores sell approximately 70 percent of all men's and boys' outerwear. Because of their size, they can publicize more widely than smaller outlets the fact that they are displaying and selling U.S.-made goods.

The types of U.S.-made clothing believed to be most marketable in Germany are specialized articles, specifically sport and casualwear; lightweight summer garments for men (of mohair, synthetic fibers, or blends of the latter with wool or cotton) including better quality "wash and wear" summer suits; overcoats with detachable fur linings, an item that sold in the 1963-64 winter season at about $110-$120 and was very popular; sportcoats the outer part of which is skin or leather and the inner part is pelt or fur (called in German *Nacktpelz* or naked pelt), retailing at $88-$90 and well accepted, especially by young men interested in sports; and outerwear for teenagers and young men. There also may be a market for stylish clothing for children up to 5 or 6 years of age.

To penetrate the German market, U.S. manufacturers should be prepared to match the efforts of their domestic and foreign competitors. This means exhibiting at the Cologne Men's Fashion Show, participating in spring and fall sales shows of finished garments organized by the largest buyers, having salesmen or regional representatives call on medium-size retailers to show samples of garments and cloth, contacting German purchasing agencies in the United States, filling German orders according to agreed specifications, and composing advertising literature and correspondence in German.

It would also be helpful if U.S. manufacturers would indicate the German equivalent of U.S. sizes in quotations and on garment labels, as is done by other foreign firms.

Tariffs and Licenses

The German import duty on men's and boys' wool outer clothing is 16 percent ad valorem, c.i.f., for all non-EEC members and 6 percent for EEC members. In addition, a turnover equalization tax of 6 percent of the duty-paid value is levied on all imported men's and boys' outerwear. No licenses are required.

ITALY

Production and Imports

Production of selected items of men's and boys' readymade outer clothing and imports of such outerwear of wool or fine animal hair in 1960 and 1961 are shown in tables 11 and 12.

Estimates of Italian foreign trade in men's and boys' outerwear, based on statistics for the first 8 months, indicate that imports increased nearly 40 percent in 1963. West Germany increased its exports to Italy by 123 percent, but the United Kingdom still leads in sales to that country, with a total value of more than $400,000 (including sales of raincoats).

Channels of Distribution

About 70-80 percent of the retailers' orders are usually placed in advance of the selling season. Small retailers order about 4 months and large retailers at least 6 months in advance. Most retailers store their own stocks of merchandise.

The Italian readymade clothing manufacturing industry is relatively new, and its channels of distribution are still being perfected. At present, almost all Italian manufacturers sell direct to the retailers through company-employed salesmen or commission agents. Some of the larger retailers have buyers who purchase direct from the manufacturer.

More and more manufacturers' retail outlets are appearing on the scene. Some of the larger manufacturers, including Facis, Lubian, Abital, Marzotto, Rinascente, and Coin, have opened retail stores in several of the major cities where they sell their products at fixed prices. These larger stores will probably gain increasing importance in the market because of their size.

Approximately 90 percent of men's and boys' readymade outer clothing is sold through small and medium-size stores—80 percent through small stores, 10 percent through medium-size stores. The other 10 percent is sold through large stores.[2] A small store is defined as a family or individually owned concern having only one place of business, employing no more than five nonfamily members, and having annual sales up to about $60,000.

Medium-size stores are for the most part closely owned corporations or limited liability partnerships. Often they have five or more outlets in no more than one or two cities. Total sales of each outlet rarely exceed $300,000 annually.

Large stores are vertically integrated chain department stores—Rinascente-Upim, Standa, Coin, among others—which have numerous outlets throughout the country, employ more than 1,000 workers, and have annual sales in excess of $10 million. Rinascente, the largest, employs approximately 10,400 workers in all its operations and has annual sales of about $130 million.

Increasing competition in the readymade clothing industry has forced manufacturers to liberalize payment terms, so that many manufacturers now accept deferred payment for as long as 4 or even 6 months. Sales on consignment are coming into increasing use. Discount terms are usually 2 percent of invoice value granted for payment within 30 days, and 1 percent for payment within 60 days.

Approximately 40-50 percent of men's readymade clothing is purchased by the consumer under the installment plan and paid for over a 6-12 month period. Installment buying by consumers is the standard practice in the smaller retail outlets.

[2] Estimate made by *Associazione Italiana degli Industriali Sull'Abbigliamento* (Italian Ready-Made Clothing Manufacturers' Association), Milan.

An estimated 85 percent of the men's and boys' readymade clothing imported into Italy is purchased by wholesalers, large specialized dealers, and a few manufacturers' agents who distribute to retailers or provincial agents. Some of the largest retail stores import and sell direct, but their share of total imports of men's and boys' clothing is probably less than 5 percent.

Payment for imported readymade men's clothing is usually made through irrevocable letters of credit against documents. Delivery time has ranged from a few weeks to 4 or more months.

Prices

Table 13 gives an indication of prices of selected types of men's and boys' readymade outerwear in three classes of outlets. These prices were obtained from stores in Milan, but they are believed to be representative of prices throughout Italy.

Average retail prices have increased approximately 15 percent since 1962 and are thought to have gone up another 15 percent in 1964 as a result of higher labor and material costs. Prices for boys' readymade clothing vary considerably according to sizes. Most boys' wear is still made by small suppliers and sold through specialty outlets.

Market Potential

The developing Italian readymade clothing industry is now able to offer a fuller range of sizes, styles, and materials than heretofore. The Italian Ready-Made Clothing Manufacturers' Association estimates that readymade items already account for more than 50 percent of Italy's consumption of men's outer clothing, and this percentage is expected to increase. The Association's figure is an average of the various categories of men's clothing, e.g., readymades account for almost 100 percent of raincoat sales and 80 percent of topcoats sales but only 25 percent of suit sales.

Total Italian imports of men's and boys' readymade outer clothing represent less than 1 percent of domestic consumption of these products. The main barriers U.S. exporters must overcome in order to increase sales are intense competition within the Italian industry, differences in color and style between Italian- and U.S.-made clothing, and liberal payment terms offered by Italian producers.

Tariffs and Licenses

The import duty on men's and boys' readymade outer clothing is 18 percent ad valorem (c.i.f.) for non-EEC countries and 7.2 percent for EEC members. A sales tax of 3.3 percent of the duty-paid value and compensatory import tax of 5 percent of the duty-paid value are applicable to all countries. No import licenses are required.

NETHERLANDS

Production and Imports

Netherlands production and imports of selected items of men's and boys' readymade outer clothing in 1961-62 are shown in tables 14 and 15, respectively.

Belgium and Luxembourg are the major source of imports of men's and boys' outer clothing, supplying 48.9 percent of the total. Germany is second, with 28.8 percent.

Channels of Distribution

Approximately 80-90 percent of the men's clothing sold in the Netherlands is ready-to-wear, and the percentage is believed to be increasing yearly. Small stores sell about 10 percent of men's and boys' readymade outer clothing and medium-size stores, 40 percent. Large stores (chain and department stores) have accounted for 50 percent, but their share of the market is increasing. Mail order houses represent about 5 percent of total sales, and they also are gaining ground. Small stores are defined as those having an annual sales volume of less than $41,790; medium-size stores, volume $41,790—$1,393,000; and large stores, more than $1,393,000.

Most retailers buy direct from the manufacturer, but about 20 percent deal through cooperative buying companies. A few retailers buy through wholesalers (primarily small goods).

Almost all orders are placed about 6 months in advance of the selling season. The goods are delivered when finished, and are stored by the retailer.

Large stores and chain stores prefer to import direct from the manufacturer, rather than through agents. This is partly because the Netherlands retailer likes to feel that he is buying on terms at least as favorable as those offered U.S. buyers. Smaller stores buy from wholesalers and/or agents.

Payment is usually made within 30 days after delivery. Drafts are often used as a means of payment. Reputable Dutch businessmen do not like to use letters of credit. This would allow suppliers to receive their money before the clients see the goods and, they fear, make it possible for manufacturers to make unauthorized changes in the orders or send substitute or substandard merchandise.

Prices

Table 16 shows prices of selected types of men's and boys' readymade outerwear in three classes of outlets.

Market Potential

U.S. ready-to-wear clothing has an excellent reputation for fit and style in the Netherlands, where the people expect quality in readymade as well as in hand-tailored clothing. The market there for U.S.-made men's and boys' outerwear appears to be growing, particularly for medium-price, ready-to-wear suits for men. Children's wear is harder to sell, however, because Dutch children do not progress from childish styles as early as do American children. A Dutch boy of six, for example, wears clothing styled like that of an American boy of four. Consequently, U.S. styles often are not obtainable in the right sizes for the Netherland market.

Netherland buyers claim that the cost of imports—high prices plus duties and transport charges—is the main factor discouraging larger sales, but they also stress U.S. suppliers' disinterest in exports and the inadequacies of U.S. export business methods. In the U.S. exporters' favor, however, is their record for delivering goods faster than European firms.

Tariffs and Licenses

As of December 1963, the duty applicable to imports of U.S. men's and boys' outer clothing of wool or part wool was 20 percent ad valorem computed on the c.i.f. value, compared with 9.6 percent for EEC countries. No import license is required.

Part II. European Free Trade Association

AUSTRIA

Production and Imports

Local retail sources estimate that about 70 percent of the men's and boys' outer clothing sold in Austria is readymade.

Production of selected items of men's and boys' readymade outer clothing in 1962 and the first 9 months of 1963 and imports of such outerwear in 1961 and 1962 are shown in tables 17 and 18.

Channels of Distribution

Imports of men's and boys' outerwear are channeled largely through wholesalers and agents, but retailers place almost all their domestic orders direct with the manufacturer, ordering about 70 percent of their stock 5-6 months in advance of the selling season and paying for the merchandise 2 or 4 months after receipt. They store their own stock.

Of total retail sales of men's and boys' readymade outer clothing, small stores (up to 3 employees, annual turnover up to about $40,000) account for 78 percent; medium-size stores (4-19 employees; annual turnover $40,000-$190,000), 20 percent; and large stores, 2 percent.

Retail sources estimate that chain stores (three or more units) account for about 80 percent of retail sales of men's and boys' outer clothing; department stores having a separate garment department account for 15 percent, and mail order houses for 5 percent.

About 50 percent of all imports of men's and boys' outer clothing are channeled through wholesalers. Agents import 20 percent, retailers 15 percent, and department stores 15 percent.

Importers expect prices to be quoted c.i.f. European port (preferably Bremen and Trieste) or destination. The usual terms of sale are prompt delivery and payment 60-90 days after receipt. However one of the largest department stores expects a discount of 3-5 percent for payment in 10 days.

Prices

Table 19 lists sample prices of selected items of men's and boys' readymade outer clothing.

Market Potential

Austrians used to be regarded as very conservative in their dress. Because the local clothing industry was protected by import barriers and resisted change, new materials and styles were late in appearing in Austrian markets. Retail sources are concerned because Austrian vacationers when abroad buy the newer styles and materials (e.g., wash-and-wear suits in Italy), which are unavailable in Austria. Considerable interest has been shown in wool and synthetic blends for men's suits.

Now that import barriers are being lowered, the market for more up-to-date styles and materials is expected to increase. United States manufacturers are urged to quote prices c.i.f., port of entry, print advertising literature in German, and stress the "Made in U.S.A." label.

Tariffs and Licenses

As of December 31, 1963, the ad valorem duty on men's and boys' outer clothing of wool was 28 percent of the c.i.f. value. This was later reduced to 25.2 percent until June 30, 1964. The ad valorem duty is not to be less than 11,000 AS ($431) per 100 kilograms. Duties on items other than wool are the duty on the fabric plus 5 percent ad valorem, the minimum duties ranging from 8,400 ($329) to 21,000 AS ($823) per 100 kilograms. A turnover equalization tax of 8.25 percent is levied on the duty-paid value. The ad valorem duty is reduced by 60 percent for EFTA members.

These products are subject to import licensing requirements under global quotas. The exporter should inquire of his agent or importer to determine the status of the quota at the time he is ready to enter the market. The quota on clothing is expected to be increased semiannually until fully liberalized.

DENMARK

Production and Imports

Production of selected items of men's and boys' readymade outer clothing and imports of selected items in 1961 and 1962 are shown in tables 20 and 21.

Channels of Distribution

Retail sources estimate that 85 percent of the men's outer clothing sold is readymade.

Large stores, including chain stores and department stores (annual sales volume over $290,000), account for about 50 percent of retail sales of men's and boys' readymade outer clothing in Denmark. Medium-size stores (annual sales volume of $145,000-$290,000) sell 35 percent of the total; and small stores (annual sales volume of less than $145,000) sell 15 percent. Chain stores account for an estimated 15 percent of sales and department stores, about 20 percent of total sales.

The Danish retailer usually orders direct from the manufacturer about 6 months in advance of the selling season. The supplier then holds the stock until the stipulated time of delivery (e.g., one-third to be delivered on March 1, one-third on April 1, and one-third on May 1).

The importing retailer usually orders through a sales agent, and only department stores import direct. Drafts at 30-60 days are widely used. Danish retailers prefer a draft attached to documents rather than establishment of irrevocable letters of credit.

Prices

Sample prices of selected items of men's and boys' readymade outer clothing are given in table 22.

Sizes

A modified "Italian" style is the primary influence in men's wear in Denmark.

Market Potential

The Danish readymade clothing industry is well developed and dominates the domestic market for men's and boys' outer clothing. However, trade sources believe that a market exists for U.S.-made men's and boys' readymade outer clothing for sports and leisure wear, but principally for cotton and cotton/synthetic blended fabrics, rather than wool.

Licenses and Tariffs

The ad valorem duty in Denmark on men's and boys' readymade outer clothing is 20 precent unless wool comprises less than 50 percent, by weight, of the material, in which case the ad valorem duty is 22.5 percent computed on the c.i.f. value. These duties are reduced by 60 percent for EFTA members.

A turnover tax of 9 percent is assessed on imports of men's and boys' outer clothing regardless of the country of origin. No import license is required.

NORWAY

Production and Imports

Production of selected items of men's and boys' readymade outer clothing in 1960 and 1961 and imports of such items in 1961 and 1962 are shown in tables 23 and 24.

Readymade men's clothing accounts for approximately 97 percent of men's clothing sales. In the case of most categories of men's and boys' outer clothing of wool and cotton, domestic production supplies about 90 percent of the local consumption. Detailed statistics on the various categories of men's and boys' clothing of manmade fibers are not available. Oslo, Bergen, and the More area are the main centers of the clothing industry. However, owing to a labor scarcity in these areas, there is a trend towards expanding the industry in small communities where labor is more readily available.

Channels of Distribution

Eighty percent of the men's and boys' readymade clothing is sold at retail by medium-size stores of 3-20 employees. Small stores (1-2 employees) sell 10 percent, and large stores (more than 20 employees) sell 10 percent. Of the large stores, department stores account for approximately 7 percent of total sales and mail order houses for 3 percent. Chain stores presently handle only men's shirts, but they plan to expand their range of men's clothing.

The larger Norwegian manufacturers have their own sales organizations selling direct to retailers, while a number of medium-size and smaller producers sell to retailers through wholesalers and agents. Retailers and wholesalers are starting to strengthen their bargaining position with suppliers by making joint purchases.

Until recently, few of the more than 500 cooperative stores located all over Norway sold men's and boys' outer clothing. However, a majority of the cooperative stores are expected gradually to expand into this field and through large-quantity buying are likely to have a great influence on clothing sales. Mail order houses are also expected to slightly increase their share of sales.

Domestic orders are usually placed 3-4 months in advance of the selling season. The order is then delivered in prearranged lots throughout the season.

Men's and boys' outer clothing is usually imported through an exclusive distributor or general agent appointed by the foreign exporter. Some foreign orders are placed direct with the manufacturer.[1]

Most importers, exporters, and manufacturers' agents are located in Oslo and work through subagents in Bergen, Stavanger, Trondheim, and Kristiansand. Oslo is regarded as the principal distribution center, and Bergen is an important secondary distributing center on the West Coast. Stavanger, located south of Bergen, also receives a considerable volume of imports direct. In the north, Trondheim is the major distributing center, and Tromsö and Narvik are secondary centers.

Importers prefer to buy clothing in small lots, testing the popularity of a product before committing themselves with a large order. Payment is usually made through irrevocable letters of credit, or in cash against sight documents of 60 days or more. Quotations on a c.i.f. basis in U.S. dollars or Norwegian crowns are preferred. Foreign orders by retailers are usually placed 6 months in advance of the selling season.

EFTA countries enjoy up to a 60-percent tariff advantage and therefore U.S. producers need to keep prices as low as possible to be competitive. Rapid deliveries from the United States and low freight and handling charges might be achieved by using the free port of Gothenburg or practically equivalent facilities in Oslo as points of distribution for both Norway and Sweden. Although Norwegian firms prefer to deal with Norwegian agents, it is believed that they would not object seriously to dealing with a joint agent for Norway and Sweden.

An alternative to using the free port would be, of course, to ship as many orders as possible under the same bill of lading and have a forwarding agent break the shipment down and redistribute it to the individual buyers.

Prices

Sample prices of selected items of men's and boys' readymade outer clothing are given in table 25.

Market Potential

Because of the country's rather small population, the Norwegian market for men's and boys' clothing is limited. The U.S. share of that market also is small, apparently because U.S. producers and exporters have had no program of sustained sales effort. If a more vigorous sales policy were

[1] The following section is based on information from "Basic Data on the Economy of Norway," *World Trade Information Service, Economic Reports,* Part 1, No. 61-62, Bureau of Foreign Commerce, U. S. Department of Commerce.

pursued, the U.S. share of the market probably could be increased, inasmuch as the price, style, and quality of U.S. men's and boys' readymade clothing are competitive and U.S. products are popular.

With the increasing prosperity enjoyed by Norwegians sales of clothing are expected to be greater, especially sales to the teenage and young adult groups who have the greatest purchasing power. Although consumers are quality conscious and place great emphasis on workmanship and durability, the younger age groups are particularly interested in style and shades, often discarding clothing that shows no signs of wear but is not the latest fashion.

Norwegians regard price as an important factor in buying men's and boys' outer clothing, but their principal considerations are quality and style. Suits are generally "all year" and made of wool. Summers are short in Norway, and very few light-weight suits are sold. It is believed that with increasing prosperity an appreciable market for light-weight summer suits of manmade fibers will appear.

There seem to be no insurmountable obstacles to increasing U.S. exports of men's and boys' outer clothing to Norway. The most apparent reason for the relatively insignificant share the United States has of the Norwegian market is that no sustained sales effort has been made by U.S. producers and exporters of men's and boys' clothing. To promote sales of a substantial size, it is believed that a fairly large investment in advertising would be required.

Licenses and Tariffs

An ad valorem duty of 25 percent is set on men's and boys' readymade outer clothing of wool. If the chief constituent material is silk or continuous manmade fibers, or if the garment is fur trimmed, the ad valorem duty is 30 percent (minimum $1.97 per lb.) These duties are reduced by 60 percent for EFTA members.

A turnover tax of 11.11 percent is assessed on imports of men's and boys' outer clothing regardless of the country of origin. No import license is required.

SWEDEN

Production and Imports

Production of selected items of men's and boys' readymade outer clothing and imports of selected items in 1961 and 1962 are shown in tables 26 and 27.

Imports of overcoats accounted for 34.4 percent of domestic consumption during the first 9 months of 1963 (table 28). During the same period, im-

ports of trousers accounted for 21.7 percent of domestic consumption, suits, 5.6 percent, and suit coats, 6 percent.

Channels of Distribution

According to the Federation of Swedish Industries (*Sveriges Industriforbund),* approximately 90 percent of men's clothing sold in Sweden is readymade.

Trade sources estimate that small stores, sales volume of up to $38,600, account for about 20 percent of retail sales of men's and boys' outer clothing; medium-size stores, sales volume $38,600-$154,400, account for 50 percent of retail sales; and large stores, more than $154,400, account for 30 percent. Approximately 85 percent of total retail sales are made by stores specializing in men's and boys' apparel and stores maintaining individual departments for each large line of merchandise. The remaining 15 percent of men's and boys' outer garments is sold retail through chain stores and mail order houses.

Retailers customarily order direct from local manufacturers, usually placing 60-70 percent of their orders in advance of the selling season. A number of relatively small orders are placed all at once, but such contracts are repeated 4-6 times during the course of a year, depending on the size of the retail store. Large retail houses, including chain stores, store their own stocks of merchandise. Joint purchasing agencies and wholesalers store imported merchandise in their central warehouses ready for delivery to retail stores.

Swedish imports of men's and boys' outer clothing are small. Ninety percent of the imports are bought by large retail clothing stores, retailers' joint purchasing agencies, and large department stores. Textile wholesalers buy very little.

Irrevocable letters of credit are used for most business transactions with U.S. firms. Other terms used are cash against sight documents of 60 days or more.

Quotations should be made in U.S. dollars or Swedish crowns and should include cost, insurance, and freight.

Prices

Sample retail prices in three classes of outlets of selected items of men's and boys' readymade outer clothing are given in table 29. Manufacturers' average prices are shown in table 30.

Market Potential

The prospects for increasing the U.S. share of the market for boys' outer clothing are good. Several large textile retail stores in Stockholm already

carry U.S.-made clothing, and retailers report considerable consumer interests in U.S.-made leisure or sports wear items, including zip-up jackets; car-coats, cotton or wool shell, with or without hoods, with or without liners, treated for water repellency; sport coats and jackets; and wash-and-wear garments, including shirts and slacks. One retailer reported that sales of U.S.-made suits were rather small because of their styling differences and somewhat higher prices.

Retailers are interested in U.S.-made men's and boys' overcoats, topcoats, sportcoats, and sport and leisure wear. They would welcome advertising brochures, color-illustrated catalogs, and price schedules (preferably quoted c.i.f. Sweden), featuring all kinds, styles, and sizes of men's and boys' readymade outer clothing.

Tariffs and Licenses

The tariff on men's and boys' outer clothing for non-EFTA members is 13 percent ad valorem if the garments are made of wool, and 17 percent if the garments are predominantly of silk or continuous manmade fibers. These duties are reduced by 60 percent for EFTA members. A turnover tax of 6.4 percent is assessed on imports of men's and boys' outer clothing regardless of the country of origin. No import license is required.

SWITZERLAND

Production and Imports

Production of men's readymade outer clothing in 1963 and imports of men's and boys' readymade outer clothing of wool or other animal hair in 1961 and 1962 are shown in tables 31 and 32, respectively.

Channels of Distribution

Approximately 85 percent of the men's clothing sold at retail is readymade. Following is the sales index for Men's and Boys' Readymade Outer Clothing published by the Textile Review, official publication of the Swiss textile industry, Issue No. 10, March 5, 1964 (1949=100):

1958	136.2
1960	162.8
1962	194.3
1963	215.5

The Textile Revue states that the sales increase of men's and boys' readymade outer clothing is very high in comparison to the general sales increase of textile goods.

Medium-size stores account for 60 percent of retail sales of men's and boys' readymade outer clothing, small stores 15-20 percent, and large stores 25 percent.[2] Chain stores handle 40 percent of retail sales of men's and boys' outer clothing, department stores 5 percent, and mail order houses only a minor proportion.

Swiss manufacturers of outer clothing sell their products through salesmen who call on the retailer. Retailers place almost their entire order approximately 6 months ahead of the selling season and receive the merchandise as it is completed.

Men's and boys' outer clothing usually is imported through agents and manufacturers' representatives; only an insignificant amount is bought direct by the retailers.

Domestic credit terms customarily provide for a 2-percent discount for payment within 30 days, or net payment within 30, 60, or, in some cases, 90 days from the date of delivery. For payment within 1-24 days a discount of 3 percent is usually allowed. The Swiss consumer's very high standards of quality require that foreign suppliers comply exactly with agreed quality specifications.

Prices

Sample prices of selected items of men's and boys' readymade outer clothing in three classes of outlets are shown in table 33.

Market Potential

Swiss retailers fill most of their requirements for men's and boys' outer clothing from domestic manufacturers. Total imports into Switzerland are still small, but some of the larger department stores and chain stores currently display imported men's and boys' outer garments.

Tariffs and Licenses

The duties for men's and boys' outer garments are computed on the basis of dutiable weight rather than value, and are given in Swiss francs per 100 kilos (220 lbs.). To calculate the dutiable weight, a tare percentage of 10 percent is added to the "net weight" of the goods (the net weight of the goods and their immediate packing). The dutiable weight is then the gross weight (aggregate weight of the container and its contents) or the net weight plus tare percentage, whichever is higher. The duty applicable to imports from the United States of men's and boys' outer garments of wool or other animal hair is 650 Swiss francs ($150.12) per 100 kilos.[3] The duty applicable to EFTA countries is 260 Swiss francs ($60.04) per 100 kilos.

[2] The basis of determining store sizes was not furnished in the source material.
[3] As of December 1963, one U.S. dollar equaled 4.33 Swiss francs.

A sales tax of 5.4 percent on the c.i.f. duty-paid value is also charged. An import permit is required, but it has always been granted. The issuing office is the Service des Importations et des Exportations, Mattenhofstrasse 5, Bern.

UNITED KINGDOM

Production and Imports

Production of selected items of men's and boys' readymade outer clothing in 1954, 1958, and 1961, and imports of selected items in 1958-60 are shown in tables 34 and 35.

Rough quantity estimates of production for 1963 are as follows, in thousands of units:

	Men's	Boys'	Total
Suits	8,400	2,000	10,400
Topcoats and overcoats	2,100	750	2,850
Slacks and sportcoats	28,000	14,000	42,000

In 1962, U.K. imports of men's and boys' suits, coats, slacks, and other outerwear were valued at $16,138,000. The major suppliers were as follows:

Country	Thousands of dollars	Country	Thousands of dollars
Total	16,138	Irish Republic	820
Hong Kong	7,678	West Germany	795
Canada	1,408	Belgium	585
Italy	997	Sweden	487
United States	949	Other	2,419

Imports of these products in 1963 are estimated at $18,000,000.

Channels of Distribution

In 1961, the total value of retail sales of men's and boys' clothing, including suits, coats, slacks, and other outerwear, in the United Kingdom was estimated at $1,333 million and represented 2.8 percent of total consumer expenditures.[4] The estimated value of retail sales for Great Britain alone was $1,168 million. Approximately one-third of these latter sales were through independent stores; one-third through multiples (chain stores); and the rest through cooperatives, department stores, variety and general stores, mail order houses, and credit trades calling on customers. Distribution of

[4] "Men's and Boys' Wear—Trade Review and Forecast," *Retail Business*, No. 51, May 1962, published by the Economist Intelligence Unit, Ltd., Marketing Department, 22 Ryder Street, London, S.W. 1, Great Britain.

these sales by size of retail establishment was as follows: Large outlets (annual sales of over $700,000), 44 percent; medium-size outlets (annual sales of $70,000-$700,000), 30 percent; small outlets (annual sales of up to $70,000), 26 percent.

The men's suit industry in the United Kingdom is dominated by a few large manufacturing firms that operate their own chains of retail outlets. The four largest of these chains account for about one-half of the sales of men's suits in the United Kingdom. About 80 percent of suits sold by multiples (chain stores) are made-to-measure (not to be confused with handmade or tailormade, which in the United Kingdom is referred to as "bespoke" tailoring). The remainder are "readymades" (also know as "off the peg").

About 80 percent of the value of orders of retail outlets are placed direct with manufacturers, and 20 percent, with wholesalers. Retailers order 10-50 percent of their seasonal items 5-6 months in advance of the selling season. The remainder of the orders are placed later in the season as supplies are exhausted. The majority of outlets do not order or stock in depth, but place small reorders of 1-2 dozen items when necessary.

Imported men's and boys' clothing are usually ordered from manufacturers' agents or importers. Some retail groups, such as Smart Weston and C. & A. Modes, import on their own account. Retailers place over 50 percent of their orders for imported goods in advance of the selling season because of delays in obtaining repeat orders. These orders are placed about 5-6 months in advance of the selling season.

Prices, Styles

Markups.—In the United Kingdom the retail markup for most men's and boys' outerwear is 50 percent on the wholesale price before the purchase tax is applied (33-1/3 on the selling price). However, at least one large chain that works on a volume basis uses a markup of 33-1/3 percent. Markups on specialty and luxury items are higher than for most other outerwear, ranging from 55 to 65 percent.

The markup for wholesalers is 15-20 percent. For importer-distributors who sell direct to retailers it is slightly higher. Importers who sell to wholesalers take as low as 5-10 percent. An import agent usually gets 5 percent or slightly more, depending upon his role in a given transaction.

Retail prices.—Sample prices of selected items of men's and boys' readymade outer clothing in three classes of outlets are shown in table 37.

Table 38 shows the distribution of purchases of readymade and made-to-measure men's suits by price range.

The style of men's suits manufactured in the U.K. have changed gradually but considerably in the past 6-8 years, influenced largely by fashions from Italy, France, Scandinavia, and the United States. British men generally are slow to adopt style changes and will not add to their wardrobes

to keep up with the latest fashions. A study by the Odhams' Press Research in 1959 showed that 62 percent of the men surveyed bought no suits that year, 34 percent bought one suit, 3 percent bought two suits, and 1 percent bought three or more suits.

British suits in general are more form fitting than the U.S. styles and fairly subdued in color (black, blue, grey, brown). Most are three-button suits with center vent coats. Trousers have cuffs, and are fashionably narrow. Seventeen inches is the maximum and sixteen the average. Several British manufacturers produce a made-to-measure American-cut suit, and styles reasonably close to American cuts can be found among the higher priced readymades.

Midweight fabrics (11-14 ounces) are beginning to be more widely used and may pave the way for greater acceptance of lightweight suits. The present average weight of fabrics is 15-16 ounces. Use of synthetic fibers, now in about one-third of all suits made, is steadily increasing.

Most of the lightweight suits now being sold are bought by the older generation (possibly because they are more able to afford a suit that will be worn only a few times a year). These lightweight suits are similar in style to those described above.

Market Potential

The market for boys' suits in the United Kingdom is small, since a large percentage of school-age males wear uniforms (a blazer and matching short or long trousers, depending on the boy's age) which by tradition are made by domestic manufacturers. It is unlikely that U.S. producers could move into this market.

Boys' nonschool clothes are mostly casual wear, and it is in this area that U.S. sales may be increased. However, a well-directed sales effort would be required. The best market seems to be the teenage bracket. This age group is quick to follow fads in clothing, which also influence styles for the 20-30 year olds and beyond.

Imports of men's suits are small, and prospects for increasing direct sales are slim because of disadvantages in style, price, durability, and delivery time. Prices of the U.S.-made suits are perhaps a greater limiting factor than their style. Another obstacle to overcome is the British preference for the individually tailored suit. Most British suits are made to measure and sell within a price range of $35-60. These suits are identified in the public mind with the high-prestige "bespoke suit" cut by the tailors of Savile Row.

To promote U.S.-made suits effectively and to compete with the delivery time of U.K. manufacturers, the U.K. distributor would have to carry a wide range of sizes, patterns, and weights, or guarantee reasonably quick delivery by airfreight. He would also have to undertake any minor alterations required.

U.S. manufacturers of men's and boys' outerwear, particularly casual wear and lightweight suits, are urged to participate in the annual International Men's and Boys' Wear Exhibition, organized by Trade Fairs and Promotions Ltd., Commonwealth House, New Oxford Street, London, W.C. 1, England.

Import Tariffs and Licenses

U.K. imports of men's and boys' outer clothing are dutiable at ad valorem rates which vary according to the fiber content of the garment and the country of origin. Three ad valorem duty rates apply to imports of U.S. men's and boys' outer clothing—20 percent on garments of all-wool fabrics or part-wool fabrics in which manmade fibers constitute less than 5 percent of the fabric's total value; 22.5 percent [5] on garments of part-wool fabrics in which manmade fibers are 5-20 percent of the fabric's total value; and 25 percent [5] on garments of part-wool fabrics in which manmade fibers make up more than 20 percent of the fabric's value.

Preferential duty rates apply to imports from Commonwealth Countries: All-wool garments enter the United Kingdom duty free. On part-wool garments, the ad valorem duty is 10 percent when the manmade fiber content of the fabric is less than 5 percent by value, 20 percent [5] when the manmade fiber content is 5-20 percent of the fabric's total value, and 22.5 percent [5] when the manmade fiber content exceeds 20 percent of the fabric's total value.

The ad valorem rate on men's and boys' outer clothing imported from EFTA members is 10 percent for all-wool garments or part-wool garments containing less than 5 percent manmade fibers by value, 11.25 percent [5] for part-wool garments containing 5-20 percent man-made fibers by value, and 16.66 percent [5] on garments containing over 20 percent manmade fibers by value.

A 10-percent purchase tax is levied on all categories of clothing. The purchase tax is levied on the wholesale value of the goods and applies to imports from all countries. No import licenses are required on clothing, and the necessary foreign exchange permits are issued on application.

[5] Minimum rate chargeable.

Tables

Table 1.--BELGIUM-LUXEMBOURG ECONOMIC UNION: IMPORTS OF SELECTED ITEMS, BY PRINCIPAL COUNTRY OF ORIGIN, 1961-62

(Quantity in units unless otherwise indicated; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
Overcoats, excepting raincoats, total	129,876	126,464	1,763,873	1,639,222
Netherlands	97,493	108,742	1,126,203	1,165,608
West Germany	13,137	9,036	308,962	261,148
United kingdom	2,523	2,212	84,984	74,156
Suits, total	125,035	131,976	2,547,253	2,657,120
Netherlands	87,568	91,657	1,553,348	1,648,923
West Germany	21,177	20,514	620,329	622,527
Jackets, total	174,964	142,683	1,441,120	1,136,406
Netherlands	147,224	113,262	1,111,047	841 788
France	.....	11,054	.....	109,450
West Germany	8,440	5,093	109,864	70,388
Long pants, total	137,293	189,438	601,644	738,551
Netherlands	92,356	129,296	390,597	456,078
France	26,509	32,142	146,592	176 891
West Germany	.....	6,721	.....	32,107
United States	.....	9,809	.....	25,814
Other, total (quantity in kilograms	477	385	375,261	458,964
Netherlands	279	239	170,048	265,698
France	40	36	74,699	79,988
Italy	24	30	30,994	35,054
United kingdom	26	.....	37,991	.....

Source: Bulletin Mensuel de Commerce Extérieur de l'Union Economique Belgo-Luxembourgeoise 1961 and 1962, Ministere de Affaires Economiques et de l'Energie, 1962 and 1963.

Table 2.--BELGIUM: SAMPLE RETAIL PRICES OF SELECTED ITEMS, JANUARY 1964

(In dollars)

	Suits		Overcoats		Topcoats	
	Men's	Boys'	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet	124.00	63.00	140.00	46.00	90.00	46.00
Medium price in a medium-price outlet	50.00	30.00	54.50	30.00	40.00	24.00
Low price in a low-price outlet	35.90	21.00	25.00	19.50	18.50	13.50

	Sportcoats		Slacks	
	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet	66.50	24.00	25.00	17.00
Medium price in a medium-price outlet	23.00	14.00	12.00	8.00
Low price in a low-price outlet	17.50	9.25	9.95	6.25

Table 3.--LUXEMBOURG: SAMPLE RETAIL PRICES OF SELECTED ITEMS, JANUARY 1964[1]

(In dollars)

	Suits		Overcoats		Topcoats	
	Men's	Boys'	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet	105	89	125	94	73	52
Medium price in a medium-price outlet	67	46	57	52	52	42
Low price in a low-price outlet	44	21	26	26	26	21

	Sportcoats		Slacks	
	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet	89	63	24	16
Medium price in a medium-price outlet	42	26	16	12
Low price in a low-price outlet	21	19	10	7

[1]Prices for boys' clothing vary according to ages.

Table 4.--FRANCE: PRODUCTION OF SELECTED ITEMS, 1960

(In units)[1]

Type	Men's		Boys[2]
	For government entities	For commercial market	
Suits, 2-3 piece:			
Wool	15,781	1,476,001	359,466
Wool and synthetic fiber blend	2,344	306,455	53,168
Sport jackets	157,409	1,573,358	409,439
Slacks:			
Wool	90,933	2,243,212	1,373,927
Wool and synthetic fiber blend	39,078	2,442,707	922,931
Overcoats, topcoats	24,793	614,391	475,295
Miscellaneous dress and business attire	108,514	184,212	241,090
Sports and casual attire:			
Jackets	2,125	322,284	128,244
Slacks and walking shorts	46,524	2,892,549	2,719,406
Windbreakers, sheepskin lined	9,760	61,207	50,100
Windbreakers for winter sports	535	103,981	160,380
Leather jackets	1,198	137,856	38,885
Ski pants	.....	150,866	141,462
Hunting and fishing attire	.....	188,310	.....
Miscellaneous	188,402	560,244	217,319

[1]Data on value of production are not available.
[2]Under 15 years of age.

Table 5.--FRANCE: IMPORTS OF SELECTED ITEMS, BY COUNTRY OF ORIGIN, 1961-62

(Quantity in kilograms; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
Men's wool cloaks and overcoats, total	26,184	59,874	361,377	811,968
West Germany	5,284	31,298	76,941	437,728
Italy	8,785	12,907	99,886	123,124
United Kingdom	5,139	5,586	105,353	120,487
BLEU	3,503	4,271	34,111	50,913
Austria	.....	2,477	.....	31,440
Netherlands	1,396	2,135	15,477	25,558
Sweden	.....	497	.....	11,359
Switzerland	686	632	10,720	10,548
Other countries	1,391	71	18,884	811
Men's wool suits, total	64,069	56,060	829,734	966,937
West Germany	14,242	18,564	212,947	346,247
Italy	26,755	21,242	352,094	333,469
Switzerland	6,112	5,416	119,720	109,736
United Kingdom	2,284	3,972	52,886	87,627
Netherlands	1,646	3,670	18,351	41,582
BLEU	2,378	2,908	28,523	39,148
Other countries	10,805	490	45,352	9,128

See footnotes at end of table.

Table 5.--FRANCE: IMPORTS OF SELECTED ITEMS, BY COUNTRY OF ORIGIN, 1961-62--Con.

(Quantity in kilograms; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
Jackets and other wool outer garments, total	35,951	13,793	265,895	217,039
United Kingdom	5,161	6,151	88,718	115,213
Italy	8,339	4,964	64,944	68,560
Netherlands	(1)	1,244	(1)	11,968
West Germany	20,979	724	94,311	10,953
Other countries	1,485	805	17,929	10,345

[1]Included in "other countries."

Source: Statistiques de Commerce Extérieur de la France, Premier Partie, 1961, 1962 (Paris: Direction Generale des Douanes, 1961 and 1962, et Droits Indirects).

Table 6.--FRANCE: SAMPLE RETAIL PRICES OF SELECTED ITEMS, OCTOBER 1962

(In U.S. dollars)

	Suits		Overcoats		Topcoats	
	Men's	Boys'[1]	Men's	Boys'[1]	Men's	Boys'[1]
Top price in a high-price outlet	130.00	.....	140.00	.....	80.00	.....
Medium price in a medium-price outlet	49.00	23.60	47.80	19.80	41.80	.....
Low price in a low-price outlet	40.00	21.50	19.00	15.00	26.00	.....

	Sportcoats		Slacks	
	Men's	Boys'[1]	Men's	Boys'[1]
Top price in a high-price outlet	64.00	.....	26.00	.....
Medium price in a medium-price outlet	32.00	16.20	17.00	7.40
Low price in a low-price outlet	19.80	9.00	8.18	6.00

[1]10 years of age.

Table 7.--FEDERAL REPUBLIC OF GERMANY (EXCLUDING WEST BERLIN): PRODUCTION OF SELECTED ITEMS, 1962-63[1]

(Quantity in thousands of pieces; value in millions of U.S. dollars)

Item	Quantity			Value[3] 1962
	Year 1962	Jan.-Nov.[2]		
		1962	1963	
Suits	9,247	8,614	8,372	238
Sportcoats	5,724	5,386	5,989	58
Slacks	22,646	20,948	20,929	108
Topcoats	3,507	6,640	6,467	52
Overcoats	3,665			72

[1]Separate statistics on the production of men's and boys' outer clothing are not available. Estimates by dealers of the share of the total accounted for by boys' (5-14 years) outer clothing ranged from 15 to 25 percent.

[2]Statistics for the full year 1963 had not been published at the time of this study.

[3]Excluding clothing manufactured for the account of others, which, however, is included in unit production figures.

Source: Die Industrie der Bundesrepublik Deutschland, "Reihe 3," 1962; and "Reihe 2," November 1963, both published by the Federal Office of Statistics, Wiesbaden.

Table 8.--FEDERAL REPUBLIC OF GERMANY: IMPORTS, BY COUNTRY OF ORIGIN, 1961-62[1]

(Quantity in hundreds of kilograms; value in U.S. dollars)

Country of orgin	Quantity		Value	
	1961	1962	1961	1962
Total	10,647	16,232	9,429,750	14,934,500
Austria	1,273	5,115	1,234,250	5,353,500
Netherlands	3,276	3,231	2,799,000	2,821,250
Yugoslavia	3,306	4,894	1,617,000	2,670,000
France	1,093	854	1,042,000	888,500
Italy	473	949	435,500	841,250
Switzerland	355	361	708,000	727,250
Hong Kong	303	291	639,250	611,500
Sweden	134	151	316,750	400,250
Denmark	126	117	270,250	288,000
United Kingdom	103	100	193,000	182,250
BLEU	97	99	118,000	113,250
United States	94	47	47,500	18,000
Norway	.....	17	.....	11,000
Israel	.....	5	.....	5,500
Spain	9	.....	3,750	.....

[1]Suits, topcoats, overcoats, sportcoats, and slacks of wool or fine animal hair.

Source: Aussenhandel, Reihe 2 (Wiesbaden: W. Kohlhamer Verlag, 1962 and 1963).

Table 9.--FEDERAL REPUBLIC OF GERMANY: SAMPLE RETAIL PRICES OF SELECTED ITEMS, BREMEN, FEBRUARY 1964[1]

(In U.S. dollars)

	Suits		Overcoats		Topcoats	
	Men's	Boys'[2]	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet[3]	120	33 23	119	25	[4]100 [5]85	[5]20
Medium price in a medium-price outlet	52	20 16	48	18	[4]35 [5]22	[5]15
Low price in a low-price outlet	25	15 12	20	11	[4]20 [5]12	[5]10

	Sportcoats		Slacks	
	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet[3]	61	15	29	11
Medium price in a medium-price outlet	22	10	12	7
Low price in a low-price outlet	10	6	5	5

[1]The prices were obtained from various types of retail outlets in Bremen. Competent sources believed that they are more or less representative of prices throughout the Federal Republic.

[2]The price on the upper line is for long trousers and the lower for short trousers.

[3]For men's clothing, prices of a "prestige shop" were used; boys' clothing is sold mainly in department or in chain stores, therefore, prices in those establishments for high quality goods were used.

[4]Wool.

[5]Cottor.

Table 10.--Germany: Size Chart for Men's and Boys' Outer Clothing

Published in August 1963 by the Association of the Men's and Boys' Outer Clothing Industry, Registered Association; Recognized as Binding by the Federal Association of the German Textile Retail Trade, Registered Association

Size designation	Boys' sizes														
	Regular														
	80	86	92	98	104	110	116	122	128	134	140	146	152	158	164
Height	80	86	92	98	104	110	116	122	128	134	140	146	152	158	164
Chest	52	54	56	58	60	62	64	66	68	70	72	74	76	79	82
Waist	53	55	57	58	60	62	63	64	66	67	68	70	71	73	76
Seat	58	60	62	64	66	68	70	72	74	76	78	81	84	87	90
1/2 back width	12.2	12.6	12.8	13	13.2	13.6	14	14.5	15	15.5	16	16.5	17	17.5	18
Back length	21.5	22	23.5	24.5	25.5	27	28.5	30	31.5	33	34.5	36	37.5	39	40.5
Front sleeve length	19	20.5	22	23.5	25	26.5	28.5	30.5	32.5	34.5	36	37.5	39	40.5	42
Waistband	52	54	56	57	59	61	62	63	65	66	67	69	70	72	75
Out-seam, not including waistband	42.5	46	49.5	53	57	61	65	69	73	77	81	85	89	93	97
In-seam	25	28	31	34	37.5	41	44.5	48	51.5	55	58.5	62	65.5	69	72.5

Size designation	Boys' sizes--Con.						Cadet sizes						
	Stocky						Regular				Long-slim	Stocky	
	1285	1345	1405	1465	1525	1585	38	40	42	43	84	20	21
Height	128	134	140	146	152	158	152	158	164	166	174	154	160
Chest	74	77	80	83	86	89	76	80	84	86	84	80	84
Waist	72	75	78	81	84	87	68	72	76	78	74	76	80
Seat	84	87	90	93	96	99	84	88	92	94	90	88	92
1/2 back width	15	15.5	16	16.5	17	18	17	17.5	18	18.5	18	17.5	18
Back sleeve length	31.5	33	34.5	36	37.5	39	37	39	41	41.5	44	38	40
Front sleeve length	32.5	34.5	36	37.5	39	40.5	38	40	42	43	45	39	41
Waistband	71	74	77	80	83	86	64	68	72	74	70	72	76
Out-seam, not including waistband	73.5	77	82	86	90	94	91	94.5	97	98	102.5	92	95.5
In-seam	51	54	58.5	62	65.5	69	68	71	73	74	77	69	72

See note at end of table.

Table 10.--Germany: Size Chart for Men's and Boys' Outer Clothing--Con.

Published in August 1963 by the Association of the Men's and Boys' Outer Clothing Industry, Registered Association; Recognized as Binding by the Federal Association of the German Textile Retail Trade, Registered Association

Size designation	Men's sizes											
	Regular								Short-Stocky			
	44	46	48	50	52	54	56	58	22	23	24	25
Market share	2.8%	6.4%	10.3%	7.3%	4.1%	2.2%	0.9%	0.2%	0.5%	1.5%	3.3%	3.0%
Height	168	171	174	177	180	182	184	186	162	165	168	171
Chest	88	92	96	100	104	108	112	116	88	92	96	100
Waist	80	84	88	92	96	100	104	110	84	88	92	96
Seat	96	100	104	108	112	116	119	122	96	100	104	108
1/2 back width	18.5	19	19.5	20	20.5	21	21.5	22	18.5	19	19.5	20
Back length	42	43	44	45	46	46.5	47	47.5	41	42	43	44
Front sleeve length	43	44	45	46	47	47.5	48	48.5	42	43	44	45
Waistband	76	80	84	88	92	97	102	108	80	84	88	92
Out-seam, not including waistband	98	100.5	103	104.5	106	107.5	109	110.5	94	96.5	99	101.5
In-seam	74	76	78	79	80	81	82	83	70	72	74	76

Size designation	Men's sizes--Con.											
	Short-Stocky--Con.				Short Short-Stocky							
	26	27	28	29	225	235	245	255	265	275	285	295
Market share	1.6%	1.6%	0.5%	0.3%	0.3%	0.8%	1.8%	1.7%	1.2%	0.7%	0.3%	0.2%
Height	174	176	178	180	156	159	162	165	168	170	172	174
Chest	104	108	112	116	88	92	96	100	104	108	112	116
Waist	100	104	108	113	86	90	94	98	102	106	110	115
Seat	112	116	120	124	98	102	106	110	114	118	122	126
1/2 back width	20.5	21	21.5	22	18.5	19	19.5	20	20.5	21	21.5	22
Back length	44.5	45	45.5	46	40	41	42	43	43.5	44	44.5	45
Front sleeve length	45.5	46	46.5	47	41	42	43	44	44.5	45	45.5	46
Waistband	96	100	105	110	82	86	90	94	98	102	107	112
Out-seam, not including waistband	103	104.5	106	107.5	90	92.5	95	96.5	98	99.5	101	102.5
In-seam	77	78	79	80	67	69	71	72	73	74	75	76

See note at end of table.

Table 10.--Germany: Size Chart for Men's and Boys' Outer Clothing--Con.

Published in August 1963 by the Association of the Men's and Boys' Outer Clothing Industry, Registered Association; Recognized as Binding by the Federal Association of the German Textile Retail Trade, Registered Association

Size designation	Men's sizes											
	Stout							Long-Slim				
	144	146	148	150	152	154	156	88	90	94	98	102
Market share	1.2%	1.6%	2.5%	3.3%	2.6%	1.8%	0.7%	1.9%	2.8%	5.7%	4.8%	2.5%
Height	168	171	174	177	180	182	184	174	177	180	183	186
Chest	88	92	96	100	104	108	112	88	90	94	98	102
Waist	84	88	92	96	100	104	108	78	80	84	88	92
Seat	98	102	106	110	114	118	121	96	98	102	106	110
1/2 back width	18.5	19	19.5	20	20.5	21	21.5	18.5	18.5	19	19.5	20
Back length	42	43	44	45	46	46.5	47	44	45	46	47	48
Front sleeve length	43	44	45	46	47	47.5	48	45	46	47	48	49
Waistband	80	84	88	92	96	101	106	74	76	80	84	88
Out-seam, not including waistband	98	100.5	103	104.5	106	107.5	109	102	104	106	108	110
In-seam	74	76	78	79	80	81	82	78	79	80	81	82

Size designation	Men's sizes--Con.													
	Long-Slim--Con.		Portly							Short-Portly				
	106	110	47	49	51	53	55	57	59	495	515	535	555	575
Market share	1.2%	0.3%	0.5%	0.6%	3.0%	3.2%	1.7%	1.1%	0.2%	0.2%	0.8%	0.95%	0.4%	0.2%
Height	188	190	166	168	170	172	174	176	178	162	164	166	168	170
Chest	106	110	94	98	102	106	110	114	118	98	102	106	110	114
Waist	96	100	98	102	107	112	117	122	127	102	107	112	117	122
Seat	114	118	102	106	110	114	118	122	126	106	110	114	118	122
1/2 back width	20.5	21	19.5	20	20.5	21	21.5	22	22.5	20	20.5	21	21.5	22
Back length	48.5	49	42.5	43	43.5	44	44.5	45	45.5	41.5	42	42.5	43	43.5
Front sleeve length	49.5	50	43.5	44	44.5	45	45.5	46	46.5	42.5	43	43.5	44	44.5
Waistband	92	96	96	100	105	110	115	120	125	100	105	110	115	120
Out-seam, not including waistband	112	113	99	101	103	105	107	109	111	96	98	100	102	104
In-seam	83	84	72	73	74	75	76	77	78	70	71	72	73	74

Note.--Measurements are in centimeters (1 inch equals 2.54 centimeters). This table is printed by permission of the (German) Association of Men's and Boy's Outer Clothing Industry, Registered Association.

Table 11.--ITALY: PRODUCTION OF SELECTED ITEMS, 1960-61

(Quantity in units; value in thousands of U.S. dollars)

	Quantity		Value[1]	
	1960	1961	1960	1961
Men's, total	7,058,000	7,889,744	68,598	80,944
Suits	2,110,000	2,557,724	40,740	51,154
Jackets	739,000	822,459	10,145	11,514
Trousers	2,664,000	3,094,122	14,976	15,470
Overcoats and topcoats	845,000	927,360	2,093	2,318
Shorts	700,000	488,079	644	488
Boys', total	1,491,000	1,731,872	8,536	9,446
Suits	284,000	355,922	4,350	5,339
Jackets	110,000	140,308	1,127	1,263
Trousers	480,000	568,879	1,610	1,703
Overcoats and topcoats	517,000	316,481	1,288	791
Shorts	100,000	350,282	161	350

[1]Based on estimated manufacturers' prices.

Sources: Italian Ready-Made Clothing Manufacturers' Association, Milan.

Table 12.--ITALY: IMPORTS, BY PRINCIPAL COUNTRY OF ORIGIN, 1961-62[1]

(In U.S. dollars)

Country of origin	1961	1962
Total	550,776	817,182
United Kingdom	281,410	283,619
France	70,400	182,944
West Germany	.....	58,266
Others	198,966	292,353

[1]Quantity figures are not available.

Source: Statistica Mensile del Commercio con l'Estero, Central Institute of Statistics, Rome.

Table 13.--ITALY: SAMPLE RETAIL PRICES OF SELECTED ITEMS IN MILAN, FEBRUARY 1964

(In U.S. dollars)

	Suits		Overcoats		Topcoats	
	Men's	Boys'	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet	112.00	n.a.	160.00	n.a.	144.00	n.a.
Medium price in a medium-price outlet	56.00	28.00	73.00	40.00	64.00	28.80
Low price in a low-price outlet	24.00	n.a.	16.00	n.a.	14.00	n.a.

	Sportcoats		Slacks	
	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet	112.00	n.a.	35.00	n.a.
Medium price in a medium-price outlet	40.00	24.00	17.60	9.60
Low price in a low-price outlet	n.a.	n.a.	4.00	n.a.

n.a.--Not available.

Source: City Club, La Tessile, La Rinascente, Magazzini Standa, all of Milan.

Table 14.--NETHERLANDS: PRODUCTION OF SELECTED ITEMS, 1961-62

(Thousands of units)

Item	1961	1962
Sports jackets, topcoats, and fall overcoats	1,930	1,830
Suits	1,910	2,280
Jackets	1,330	1,170
Trousers	5,470	5,090

Source: Netherlands Economic Bulletin, No. 384, December 11, 1963.

Table 15.--NETHERLANDS: IMPORTS OF SELECTED ITEMS, BY PRINCIPAL COUNTRIES OF ORIGIN, 1961-62

(Quantity in units unless otherwise specified; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
Overcoats, except raincoats, total	73,523	76,574	1,228,069	1,393,736
East Germany	.....	33,905	.....	832,179
BLEU	37,485	34,728	324,848	336,037
United Kingdom	4,283	3,504	158,802	127,926
Sweden	1,442	1,183	45,133	32,443
Denmark	646	714	18,945	21,893
Italy	317	856	7,801	18,991
France	259	276	7,522	7,649
Switzerland	287	235	5,572	4,220
Canada	.....	230	.....	2,901
Norway	.....	180	.....	2,638
West Germany	26,757	.....	649,695	.....
Hungary	703	.....	4,736	.....
Vests, total	36,476	60,246	346,300	576,855
BLEU	13,726	42,187	90,266	343,950
West Germany	11,584	9,871	130,663	127,399
Italy	3,046	2,868	33,989	37,455
United Kingdom	2,096	1,924	29,532	30,597
France	692	1,107	10,587	15,298
Switzerland	342	362	4,736	6,330
Sweden	496	274	9,472	5,539
Denmark	240	240	3,900	3,429
Czechoslovakia	.....	610	.....	2,638
United States	2,299	.....	17,552	.....
Ireland	675	.....	7,800	.....
Canada	280	.....	3,900	.....
Suits, total	156,111	145,741	2,868,466	3,459,545
West Germany	59,803	84,430	1,552,917	2,317,178
BLEU	70,864	35,409	847,780	679,723
Italy	5,402	6,464	148,772	147,972
Sweden	1,998	1,748	71,600	63,304
Switzerland	1,396	1,846	46,247	60,138
East Germany	12,668	10,571	71,600	50,379
France	515	1,373	18,109	44,576
United Kingdom	1,401	1,170	53,213	42,202
United States	1,507	1,380	44,297	36,663
Hungary	.....	800	.....	8,440
Denmark	336	195	11,423	6,330
Trousers, total	732,031	709,154	2,088,386	1,827,102
BLEU	665,514	628,483	1,836,531	1,568,348
West Germany	19,399	25,453	112,554	109,463
United States	16,324	18,804	44,297	52,226
United Kingdom	3,021	1,931	30,367	21,101
France	3,630	3,852	18,109	20,837
Italy	1,971	3,209	11,423	15,562
Sweden	633	1,426	5,293	13,452
Hong Kong	13,920	11,863	10,814	8,968
Switzerland	1,031	725	9,194	4,484
China	.....	6,000	.....	2,901
Hungary	1,700	.....	3,065	.....
Rumania	3,220	.....	2,786	.....

See footnote at end of table.

Table 15.--NETHERLANDS: IMPORTS OF SELECTED ITEMS, BY PRINCIPAL COUNTRIES OF ORIGIN, 1961-62--Con.

(Quantity in units unless otherwise specified; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
Other clothing, total (quantity in tons).....	1,095	503	4,645,656	2,293,175
BLEU.....	995	406	4,141,390	1,741,378
West Germany.....	16	17	146,822	163,798
Hong Kong.....	13	18	52,934	69,634
Japan.....	15	25	31,760	54,599
United States.....	19	7	71,322	45,895
United Kingdom.....	3	3	44,297	39,037
France.....	1	3	13,373	36,927
Italy.....	1	3	17,273	35,345
Canada.....	2	4	13,930	34,817
Hungary.....	18	8	40,954	19,255
Switzerland.....	1	1	10,308	15,035
East Germany.....	4	3	22,009	12,924
Norway.....	4	1	23,681	5,539
Sweden.....	1	0	8,915	5,012
Denmark.....	.....	0	.....	4,484
Finland.....	.....	1	.....	3,165

Source: Maandstatistick van de in-, uit- en doorvoer per goederensoort, 1961 and 1962 (Centraal Bureau Voor de Statistiek).

Table 16.--NETHERLANDS: SAMPLE RETAIL PRICES OF SELECTED ITEMS, SEPTEMBER 30, 1962

(In U.S. dollars)

	Suits		Overcoats		Topcoats	
	Men's	Boys'	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet.....	118.41	70	109	28	70	50
Medium price in a medium-price outlet.....	55.73	42	70	21	56	42
Low price in a low-price outlet.....	46.81	28	42	11	23	17

	Sportcoats		Slacks	
	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet.....	56	27	26	20
Medium price in a medium-price outlet.....	23	20	12	9
Low price in a low-price outlet.....	14	10	7	5

Table 17.--AUSTRIA: PRODUCTION OF SELECTED ITEMS, 1962 AND JANUARY-SEPTEMBER 1963

(Quantity in pieces; value in millions of U.S. dollars)

Item	Quantity		Value[1] 1962
	1962	1963 (9 months)	
Suits	271,980	240,000	6.14
Overcoats	367,190	216,000	6.95
Jackets	540,760	378,000	6.87
Trousers (excluding ski-pants and workers' slacks)	2,021,620	1,858,000	13.44

[1]No value data were available for 1963 at the time of this study.

Table 18.--AUSTRIA: IMPORTS, BY COUNTRY OF ORIGIN, 1961-62[1]

(Quantity in hundreds of kilograms; value in U.S. dollars)

Country of origin	Quantity		Value	
	1961	1962	1961	1962
Total	1,486	4,229	831,661	3,598,082
West Germany	1,263	3,607	600,392	3,067,672
United Kingdom	48	75	95,337	156,270
BLEU	76	284	24,099	88,088
United States	62	175	33,699	86,011
Sweden	10	22	25,862	58,699
Switzerland	17	18	39,381	51,724
Italy	7	30	5,290	37,931
Netherlands	1	9	3,370	20,180
Denmark	0	6	39	18,887
France	0	2	666	3,331
Norway	1	0	2,508	2,077
Hungary	.....	0	.....	313
Hong Kong	0	0	78	274
Japan	.....	1	.....	274
Rumania	.....	0	.....	78
Spain	.....	0	.....	78
Canada	1	0	745	39
Greece	0	0	39	39
Yugoslavia	.....	0	.....	39
Iran	.....	0	.....	39
Kuwait	.....	0	.....	39
Union of South Africa	0	.....	39	.....
British East Africa	0	.....	39	.....

[1]Men's and boys' suits, topcoats, overcoats, sportcoats, and slacks of fabric not rubberized.

Source: Statistik des Ausenhandele Osterreichs, 1962 (Wien: Herausgegeben vom Osterreichischem Statistischen Zentralamt, 1963)

Table 19.--AUSTRIA: SAMPLE RETAIL PRICES OF SELECTED ITEMS, NOVEMBER 1963

(In U.S. dollars)

	Suits		Overcoats		Jackets		Trousers	
	Men's	Boys'	Men's	Boys'	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet.....	104	84	125	90	54	33	33	26
Medium price in a medium-price outlet	57	48	68	60	27	17	20	15
Low price in a low-price outlet.....	31	26	41	31	11	9	10	8

Table 20.--DENMARK: PRODUCTION OF SELECTED ITEMS, 1961-62

(Quantity in thousands of units; value in U.S. dollars)

Item	Quantity		Value	
	1961	1962	1961	1962
Men's:				
Suits, 3-piece.....	23	24	892,190	991,510
Suits, 2-piece.....	387	467	12,449,558	15,383,344
Coats, other than cotton..	306	311	4,995,831	5,210,721
Waistcoats.....	11	18	61,770	84,970
Trousers, wool.....	829	1,119	6,434,957	8,280,227
Trousers, cotton.....	179	144	714,850	437,755
Shorts, wool.....	4	4	10,585	8,700
Shorts, cotton.....	159	144	234,755	164,720
Overcoats, paletots, ulsters, etc., wool.....	118	119	3,007,156	3,218,276
Peajackets, duffel-coats, auto-coats, etc., wool...	46	37	806,200	646,990
Coats, cotton.....	170	229	2,518,941	3,610,501
Boys':				
Suits, 2-piece.....	4	8	58,435	148,190
Coats, other than cotton..	24	23	246,065	232,725
Trousers, wool.....	572	490	2,685,691	2,197,621
Trousers, cotton.....	208	130	510,400	360,180
Shorts, wool.....	45	44	103,965	97,730
Shorts, cotton.....	430	287	341,910	239,250
Overcoats, paletots, ulsters, etc., wool.....	8	4	97,875	65,685
Pea jackets, duffel-coats, auto-coats, etc., wool...	19	15	166,025	106,430
Coats, cotton.....	21	37	224,750	419,340

Source: Statistiske Efterretninger, No. 2, January 17, 1964, pp. 44-45.

Table 21.--DENMARK: IMPORTS OF SELECTED ITEMS, BY COUNTRY OF ORIGIN, 1961-62

(Quantity in hundreds of units; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
MEN'S				
Coats, total	91	154	216,050	311,170
West Germany	41	55	106,865	146,015
Sweden	31	42	60,320	74,240
United Kingdom	11	17	34,945	44,950
Yugoslavia	.....	29	.....	20,880
Italy	1	1	3,770	6,380
Austria	1	2	1,450	5,510
Netherlands	5	4	2,900	5,220
Norway	0	1	870	2,610
Switzerland	1	1	3,625	2,320
BLEU	.....	0	.....	1,015
Hong Kong	.....	2	.....	870
France	.....	0	.....	725
Finland	.....	0	.....	290
United States	0	0	580	145
Spain	0	.....	725	.....
Pea jackets, anoraks and the like, total	20	6	12,470	7,975
United Kingdom	1	4	290	4,060
Sweden	2	2	3,770	2,465
West Germany	0	0	145	435
Finland	.....	0	.....	435
Austria	.....	0	.....	290
Netherlands	.....	0	.....	145
Norway	0	0	145	145
Yugoslavia	15	.....	6,815	.....
Hong Kong	2	.....	1,160	.....
Switzerland	0	.....	145	.....
Suits, total	51	85	160,370	245,195
Sweden	24	50	75,545	146,740
West Germany	21	24	65,540	69,745
Italy	2	2	6,235	8,700
United Kingdom	3	2	10,440	6,860
Yugoslavia	.....	5	.....	5,510
Switzerland	1	1	1,740	3,045
Netherlands	.....	0	.....	725
Austria	.....	0	.....	580
BLEU	.....	1	.....	290
United States	0	.....	725	.....
Hong Kong	0	.....	145	.....
Jackets, total	40	53	57,275	71,340
Sweden	19	23	27,405	39,440
West Germany	12	7	18,560	10,730
Yugoslavia	.....	13	.....	6,960
Netherlands	1	3	1,160	4,060
United Kingdom	2	2	3,335	3,770
Switzerland	1	1	870	2,320
Italy	1	1	3,045	1,885
Austria	0	1	145	870

See footnote at end of table.

Table 21.--DENMARK: IMPORTS OF SELECTED ITEMS, BY COUNTRY OF ORIGIN, 1961-62--Con.

(Quantity in hundreds of units; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
MEN'S				
Jackets--Con.				
Norway	4	1	1,450	870
United States	0	1	290	290
France	0	0	145	145
BLEU	0	.....	870	.....
Trousers, total	19	47	9,715	15,515
Sweden	14	14	5,075	8,990
West Germany	2	2	2,175	1,885
United Kingdom	1	1	1,305	1,450
BLEU	.....	22	.....	1,160
Hong Kong	.....	6	.....	725
Norway	1	1	580	580
Netherlands	.....	0	.....	290
France	1	0	290	145
Italy	.....	1	.....	145
Yugoslavia	.....	0	.....	145
United States	0	.....	290	.....
Other outer garments, total	6	16	3,915	8,845
Sweden	2	3	1,450	3,770
West Germany	2	4	870	2,465
United Kingdom	0	2	580	1,305
Italy	.....	7	.....	807
Switzerland	.....	0	.....	290
France	.....	0	.....	145
Norway	2	.....	435	.....
Netherlands	0	.....	290	.....
United States	0	.....	290	.....
BOYS'				
Coats, total	1	25	3,045	10,585
Hong Kong	.....	22	.....	8,410
West Germany	1	1	1,740	870
Sweden	0	1	1,015	870
United Kingdom	.....	0	.....	290
Norway	.....	1	.....	145
Italy	0	.....	145	.....
Austria	0	.....	145	.....
Pea jackets, anoraks and the like, total	0	1	145	725
Sweden	.....	1	.....	580
Italy	.....	0	.....	145
West Germany	0	.....	145	.....
Suits, total	1	20	3,190	61,625
Sweden	0	20	870	61,625
United Kingdom	1	.....	1,885	.....
West Germany	0	.....	435	.....

See footnote at end of table.

Table 21.--DENMARK: IMPORTS OF SELECTED ITEMS, BY COUNTRY OF ORIGIN, 1961-62--Con.

(Quantity in hundreds of units; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
BOYS'--Con.				
Jackets, total	5	1	1,305	1,595
Netherlands	.....	1	.....	1,160
Sweden	5	0	1,305	435
Trousers, total	24	4	4,495	1,595
Sweden	5	3	1,450	1,305
West Germany	.....	0	.....	145
Norway	4	1	1,450	145
Yugoslavia	15	.....	1,595	.....
Short pants, total	2	1	435	145
Sweden	2	1	435	145
Other outer garments, total	.....	2	.....	1,160
Italy	.....	2	.....	1,160

Source: Danmarks vareindførsel og -udførsel, 1961 and 1962 (København: Det Statistiske Department, 1962 and 1963).

Table 22.--DENMARK: SAMPLE RETAIL PRICES OF SELECTED ITEMS OCTOBER 1, 1962

(In U.S. dollars)

	Men's suits	Overcoats		Topcoats[1]	
		Men's	Boys'[2]	Men's	Boys'[2]
Top price in a high-price outlet	109.00	94.25	30.00	72.50	29.00
Medium price in a medium-price outlet	56.50	50.75	22.00	43.50	20.00
Low price in a low-price outlet	41.00	37.00	16.00	32.50	14.00

	Sportcoats[3]		Slacks	
	Men's	Boys'[2]	Men's	Boys'[2]
Top price in a high-price outlet	56.50	16.00	23.00	14.00
Medium price in a medium-price outlet	32.50	10.75	16.00	8.00
Low price in a low-price outlet	22.00	8.00	10.75	5.00

[1]Cotton.
[2]10 years old.
[3]Flannel blazers.

Table 23.--NORWAY: PRODUCTION OF SELECTED ITEMS, 1960-61

(Quantity in units; value in thousands of U.S. dollars)

Item	Quantity, 1960[1]	Value	
		1960	1961
Coats:			
Wool	96,672	2,360	2,681
Cotton or other fibers	146,370	2,203	2,686
Wool suits	283,641	9,230	7,794
Wool jackets	285,331	4,297	4,889
Trousers:			
Wool	1,013,292	6,867	6,223
Cotton or other fibers	1,028,162	2,656	4,718

[1]Not available for 1961.

Source: Norwegian Bureau of Statistics.

Table 24.--Norway: Imports of Selected Items, by Principal Country of Origin, 1961-62

(Quantity in thousands of units; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
MEN'S				
Overcoats and coats, total...	21	13	358,392	261,495
Sweden.....	4	4	88,434	103,949
Denmark.....	3	3	86,319	74,048
United Kingdom.....	11	5	149,788	64,598
Netherlands.....	1	1	14,386	10,860
West Germany.....	1	0	16,502	5,924
Suits, including separate jackets and trousers, total	39	46	367,278	596,897
Sweden.....	19	15	171,791	280,254
Denmark.....	6	10	118,900	202,539
Hungary.....	4	10	19,464	47,955
Netherlands.....	4	5	28,773	32,172
United Kingdom.....	1	1	8,181	16,643
United States.....	3	1	8,181	4,513
Yugoslavia.....	.....	2	.....	4,090
Czechoslovakia.....	1	.....	4,372	.....
Sports jackets, anoraks and the like, total.....	4	11	30,606	42,454
West Germany.....	.....	6	.....	25,811
Sweden.....	1	1	5,219	4,654
Hong Kong.....	.....	1	.....	4,372
United Kingdom.....	2	.....	18,477	.....
Other, total.....	2	2	10,719	11,001
Sweden.....	.....	1	.....	4,654
BOYS'				
Overcoats and coats, total...	4	2	29,055	19,464
Netherlands.....	.....	1	.....	7,898
United Kingdom.....	.....	1	.....	6,206
Sweden.....	2	.....	13,963	.....
Czechoslovakia.....	2	.....	8,181	.....
Suits, including separate jackets and trousers, total	18	17	39,069	29,055
Hong Kong.....	8	9	5,360	7,052
Hungary.....	1	2	4,513	6,206
Sweden.....	.....	1	.....	5,924
United States.....	5	1	14,528	4,513
Czechoslovakia.....	4	.....	9,309	.....
Sports jackets, anoraks and the like, total.....	3	2	10,578	6,911
Czechoslovakia.....	1	1	3,526	4,795
Other, total.....	.....	1	.....	3,526

Source: External Trade, 1961 and 1962; Volume II (Oslo, Statistisk Sentralbyra, 1962 and 1963).

Table 25.--Norway: Sample Retail Prices of Selected Items in Oslo, January 30, 1964[1]

(In U.S. dollars)

	Suits		Overcoats		Topcoats	
	Men's	Boys'	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet	99.30	(2)	147.00	(2)	70.00	(2)
Medium price in a medium-price outlet	67.50	30.50	55.00	16.00	37.00	18.50
Low price in a low-price outlet	42.00	27.00	28.00	12.50	27.50	11.25

	Sportscoats		Slacks	
	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet	40.00	(2)	23.50	(2)
Medium price in a medium-price outlet	25.00	18.50	18.20	7.10
Low price in a low-price outlet	8.25	4.90	4.25	2.80

[1]Prices of boys' clothing are for 12-year-old sizes. All prices include the 11.11-percent purchase tax.

[2]There were no prestige outlets for boys' clothing.

Table 26.--Sweden: Production of Selected Items, 1961-62

(In thousands of units)

Item	1961	1962	January-September 1963
Ulsters and overcoats	633	637	826
Jackets and anoraks	1,063	852	792
Suits	923	995	766
Suit coats	666	682	561
Separate vests	31	50	n.a.
Trousers, except work trousers	4,687	4,402	[1]3,499

n.a.--Not available.

[1]Includes work trousers.

Source: The Swedish Central Bureau of Statistics.

Table 27.--SWEDEN: IMPORTS OF SELECTED ITEMS, BY PRINCIPAL COUNTRY OF ORIGIN, 1961-62

(Quantity in units; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
MEN'S				
Coats and overcoats, total...	26,104	32,184	632,489	730,097
Denmark	8,983	12,952	203,205	288,350
Norway	4,411	6,996	97,573	141,942
United Kingdom	5,456	5,198	153,278	134,563
West Germany	4,827	3,924	127,246	113,204
Italy	1,709	1,633	42,545	32,427
Yugoslavia	.....	693	.....	6,214
Netherlands	.....	500	.....	5,437
BLEU	.....	157	.....	3,301
Switzerland	107	47	3,691	1,942
Spain	323	.....	5,051	.....
Jackets, total	4,017	3,129	40,000	44,854
Denmark	709	691	15,930	12,233
Norway	740	1,322	6,217	11,845
United Kingdom	311	518	5,245	9,126
Italy	188	241	2,914	5,631
West Germany	.....	151	.....	2,718
United States	1,627	.....	5,828	.....
Suits, total	5,734	16,692	177,087	426,019
Denmark	1,823	10,427	52,841	263,107
West Germany	1,483	2,372	43,322	74,563
Italy	1,237	1,167	43,905	41,748
Yugoslavia	263	2,238	3,108	29,515
United Kingdom	285	141	1,438	7,573
Hong Kong	.....	188	.....	4,272
Norway	62	128	2,137	2,330
United States	229	.....	8,936	.....
Switzerland	103	.....	3,691	.....
Finland	199	.....	1,943	.....
Trousers, total	18,552	12,348	150,352	117,476
Denmark	3,097	2,446	40,408	30,874
West Germany	2,368	1,803	35,746	29,320
United Kingdom	2,273	1,952	27,392	22,913
Norway	920	1,734	8,159	13,592
Yugoslavia	8,087	2,650	24,272	7,767
Austria	154	336	2,137	5,243
Hong Kong	579	1,120	3,107	4,554
Italy	674	.....	4,857	.....
United States	400	.....	4,274	.....
BOYS'				
Coats and overcoats, total...	.....	326	.....	3,689
Denmark	.....	157	.....	2,136
Suits, total	2,363	542	11,456	5,437
West Germany	.....	127	.....	3,301
East Germany	2,302	402	10,296	1,942

See footnotes at end of table.

Table 27.--SWEDEN: IMPORTS OF SELECTED ITEMS, BY PRINCIPAL COUNTRY OF ORIGIN, 1961-62--Con.

(Quantity in units; value in U.S. dollars)

Item and country of origin	Quantity		Value	
	1961	1962	1961	1962
BOYS'--Con.				
Trousers, total	18,594	7,594	42,718	22,913
Norway	723	3,933	3,108	14,951
Yugoslavia	12,649	1,700	28,363	3,301
Hong Kong	.....	927	.....	2,330
Italy	4,795	.....	9,131	.....

Source: Quarterly Trade Statistics: I. Imports, January-December 1962 (Stockholm: Central Bureau of Statistics, 1963); Foreign Trade, 1961: Part I. Sweden's Imports and Exports by Commodities and Countries (Stockholm: Central Bureau of Statistics, 1962)

Table 28.--SWEDEN: APPARENT CONSUMPTION OF SELECTED ITEMS, JANUARY-SEPTEMBER 1962-63

(Quantity in thousands of units)

Item	Production less exports		Imports		Apparent consumption	
	1962	1963	1962	1963	1962	1963
Ulsters, coats, and overcoats	538	753	320	394	858	1,147
Jackets	512	736	166	183	678	919
Suits	692	742	27	44	719	786
Lounge coats	632	552	35	35	667	587
Trousers	3,627	3,464	845	958	2,782	4,422

Source: Statistiska Meddelanden No. I, 1963:78, December 9, 1963; Månadsstatistik över utrikeshandeln, No. 9, 1962 and 1963; Kvartalsstatistik över utrikeshandeln, for January-September 1962 and 1963.

Table 29.--SWEDEN: SAMPLE RETAIL PRICES OF SELECTED ITEMS, NOVEMBER 12, 1962

(In U.S. dollars)

	Suits		Overcoats and topcoats		Sport coats and jackets	
	Men's	Boys'	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet.....	110.98	53.08	154.40	55.97	82.03	20.07
Medium price in a medium-price outlet.....	77.20	43.43	73.83	48.25	34.74	15.44
Low price in a low-price outlet.....	53.08	33.78	50.18	40.53	13.51	10.62

Table 30.--Sweden: Manufacturers' Average Prices for Selected Items, 1962-63

(In U.S. dollars)[1]

Item	Average price per unit		Average lowest and highest price per unit, 1963
	1962	1963	
Outer clothing of wool:			
Men's suits.....	34.45	35.17	23.55-42.07
Boys' suits.....	26.59	27.65	18.72-36.48
Men's blazers.....	19.69	19.59	7.91-25.67
Boys' blazers.....	12.35	12.21	5.40-21.23
Men's overcoats.....	28.18	25.43	18.34-33.78
Boys' overcoats.....	n.a.	19.40	8.69-26.44
Men's jackets.....	11.82	11.19	4.63-13.51
Boys' jackets.....	10.18	9.60	4.83-10.04
Men's trousers.....	7.72	7.72	4.87-14.47
Boys' trousers.....	5.55	5.74	3.68- 9.17
Outer clothing of cotton:			
Men's overcoats.....	19.59	19.78	14.28-24.70
Boys' overcoats.....	15.34	15.83	10.62-19.01
Men's jackets.....	7.58	8.35	2.12-15.05
Boys' jackets.....	6.61	7.00	3.67-11.19
Men's trousers.....	2.75	2.65	1.50- 4.83

n.a.--Not available.

[1]Prices have been converted from kronor. One krona equals U.S. $0.193.

Source: "Pris- och Kartellfrågor" No. 8, 1963, published by the Swedish State Price and Cartel Board (Statens Pris- och Kartellnåmnd).

Table 31.--Switzerland: Production of Selected Items, 1963

(In units)[1]

Item	1963	Percent increase from 1962 to 1963
Suits	707,512	8.2
Overcoats	181,743	18.8
Topcoats	198,286	4.3
Sportcoats	312,581	6.8
Slacks	1,150,332	1.6
Ski pants	194,558	46.7

[1]Value figures are not available.

Source: The Swiss Federal Statistics Bureau (Eidgenössisches Statistisches Amt), Bern.

Table 32.--Switzerland: Imports, by Country of Origin, 1961-62[1]

(Quantity in kilograms; value in U.S. dollars)

Country of origin	Quantity		Value	
	1961	1962	1961	1962
Total	301,480	271,888	4,586,669	4,401,325
West Germany	166,052	133,670	2,632,499	2,198,494
Netherlands	63,660	57,833	673,797	679,685
United Kingdom	20,404	22,941	498,213	579,040
Italy	17,006	16,230	293,517	317,751
France	21,056	20,388	239,417	248,732
Austria	2,505	11,454	35,001	150,403
Sweden	4,517	4,678	111,797	128,230
Denmark	3,024	1,998	38,865	42,975
United States	1,554	1,208	42,234	38,208
BLEU	549	741	6,451	6,579
Israel	562	456	7,789	6,037
Canada	2	13	105	394
Norway	55	.....	2,357	.....
Other countries	534	278	4,628	4,797

[1]Men's and boys' suits, topcoats, overcoats, sportcoats, and slacks of wool or other animal hair.

Source: Statistique Annuelle du Commerce Exterieur de la Suisse, tome premier, 1961 and 1962 (Publie par la Direction Generale des Douanes) Berne.

Table 33.--Switzerland: Sample Retail Prices of Selected Items, March 13, 1964

(In U.S. dollars)

	Suits		Overcoats		Topcoats	
	Men's	Boys'[1]	Men's	Boys'[1]	Men's	Boys'[1]
Top price in a high-price outlet	110.85	35.00	161.66	40.00	80.83	33.00
Medium price in a medium-price outlet	50.80	23.00	57.50	28.00	30.00	18.47
Low price in a low-price outlet	36.89	19.50	34.64	18.00	16.50	14.00

	Sportcoats		Slacks	
	Men's	Boys'[1]	Men's	Boys'[1]
Top price in a high-price outlet	64.66	30.00	23.00	14.00
Medium price in a medium-price outlet	27.71	16.16	15.00	9.00
Low price in a low-price outlet	19.63	14.00	10.00	7.00

[1]Boys between the ages of 8 and 10 years.

Table 34.--United Kingdom: Production of Selected Items in 1954, 1958, and 1961

(Quantity in thousands; value in millions of U.S. dollars)

Item	1954		1958		1961, estimated[1]	
	Quantity	Value	Quantity	Value	Quantity	Value
Total, all firms	.....	427.6	.....	429.0	.....	540.0
Firms employing 25 or more, total	.....	347.2	.....	352.8	.....	444.5
Men's, total	24,695	236.0	27,770	266.6	34,500	339.3
Suits	5,822	117.3	6,146	131.9	7,000	167.3
Topcoats and overcoats	857	17.6	1,666	29.4	2,000	34.0
Sportcoats and slacks	18,016	101.1	19,958	105.3	25,500	138.0
Boys', total	12,603	32.2	11,155	32.8	14,700	37.4
Suits	2,110	10.4	1,318	7.6	1,700	10.6
Topcoats and overcoats	468	2.8	498	2.8	700	3.3
Sportcoats and slacks	10,025	19.0	9,339	22.4	12,300	23.5
Other men's and boys' outerwear[2]	.....	79.0	.....	53.4	.....	67.8
Firms employing fewer than 25	.....	80.4	.....	76.2	.....	95.5

[1]No official production data are available since the 1958 Census of Production.

[2]Service uniforms, leather clothing, academic, legal, ecclesiastical robes, gowns, and other items.

Source: 1958 Census of Production, United Kingdom.

Table 35.--United Kingdom: Imports by Country of Origin, 1958-60

(In thousands of U.S. dollars)

Item	1958	1959	1960
Total outerwear.....	4,820	5,335	11,880
(U.S. as percent of total)	(2.7)	(2.0)	(5.7)
Suits, coats, and slacks, total	3,908	4,320	9,788
Hong Kong.....	3,076	3,331	6,685
United States.....	58	55	523
Belgium.....	108	121	430
West Germany.....	91	178	401
Netherlands.....	161	122	374
Italy.....	285	233	214
Other.....	129	280	1,161
All other outerwear, total.....	4,912	1,015	2,092
West Germany.....	97	137	396
Italy.....	191	119	256
Hong Kong.....	210	186	223
United States.....	71	51	159
Other.....	343	522	1,058

Source: Annual Statement of the Trade of the United Kingdom with Commonwealth and Foreign Countries, 1959 and 1960.

Table 36.--GREAT BRITAIN[1]: DISTRIBUTION OF RETAIL SALES BY TYPE OF RETAIL OUTLET, 1961

(Value in millions of U.S. dollars)

Type of outlet	Value	Percent of of total
Total.....	1,168	100.0
Independents.....	391	33.4
Multiples (chain stores)..	370	31.7
Cooperatives.....	76	6.5
Department stores.....	95	8.1
Variety and general stores	118	10.1
Mail order houses.....	45	3.9
Credit trades calling on customers.....	73	6.3

[1]England, Scotland, and Wales.

Source: "Men's and Boys' Wear--Trade Review and Forecast," Retail Business, No. 51, May 1962, published by the Economist Intelligence Unit, Ltd., Marketing Department, 22 Ryder Street, London, S.W. 1, Great Britain.

Table 37.--UNITED KINGDOM: SAMPLE RETAIL PRICES OF SELECTED ITEMS IN LONDON, FEBRUARY 1964

(Value in U.S. dollars)

	Suits		Overcoats		Sportcoats	
	Men's	Boys'	Men's	Boys'	Men's	Boys'
Top price in a high-price outlet	88.20	.....	165.00	66.00	60.00	30.00
Medium price in a medium-price outlet	37.80	.....	50.00	36.00	33.00	20.00
Low price in a low-price outlet	20.94	.....	25.00	18.20	21.00	10.00

	Slacks			
	Wool worsted	Terylene and wool worsted	Boys' wool worsted	Men's vests
Top price in a high-price outlet	23.00	20.00	20.00	15.00
Medium price in a medium-price outlet	14.00	14.00	12.00	12.00
Low price in a low-price outlet	8.20	7.00	4.20	4.90

Table 38.--UNITED KINGDOM: DISTRIBUTION OF PURCHASES OF READYMADE AND MADE-TO-MEASURE MEN'S SUITS BY RETAIL PRICE, 1962

(Prices in U.S. dollars)

Price	Percentage of men purchasing suits
Less than 19.50	2
19.50-22.40	1
22.40-25.20	3
25.20-28.00	4
28.00-33.60	12
33.60-42.00	26
42.00-56.00	19
56.00-84.00	13
More than 84.00	5
"Don't knows," etc	15

Source: Clothing Manufacturers' Federation, London.

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